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ABSTRACT

Part of a series of competency-based materials for vocational administrator education, this guide explains how to develop and implement a program of competency-based administrator education (CBAE). Following an introduction which explains the needs for competency-based administrator education, the guide is organized in six chapters. The first chapter presents an overview of CBAE concepts, research, and material development, while the second chapter suggests various approaches to presenting CBAE programs. Delivery systems suggested include preservice programs, inservice programs, internships, externships, graduate courses and programs, workshops and seminars, and independent or self-study. In the third chapter, planning for the change to CBAE is discussed, while chapter 4 presents the role of the resource person in a CBAE program. The final two chapters discuss the management and implementation of a CBAE program. Appendixes to the guide include the following information: competency-based administrator education concepts, CBAE research in vocational education, competencies important to secondary and postsecondary local vocational education administrators, development of CBAE modules, and CBAE program descriptions. A bibliography is included in the guide. (KC)

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Resource Person's Guide to Implementing Competency-Based Administrator Education Concepts and Materials

COMPETENCY BASED VOCATIONAL EDUCATION ADMINISTRATOR MODULE SERIES

Consortium for the Development
of Professional Materials for Vocational Education

Robert E. Norton, Consortium Program Director
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The National Center for Research in Vocational Education
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FOREWORD

Most people would agree that excellent programs of vocational and technical education are needed if we are to adequately prepare our youth and adults for the many challenges of the work place. Excellent programs, however, cannot be provided or maintained unless competent leadership personnel are available to guide and direct them. Secondary, postsecondary, and state-level administrators must be given ample opportunities (1) to obtain the best possible preparation for their jobs before they assume them and (2) to upgrade and refine their skills while on the job. Competent leadership is critical; we must have professionally prepared administrators who possess the knowledge, skills, and attitudes required for effective performance.

In the last few years, a considerable amount of work has been done by vocational researchers and program developers to devise high-quality competency-based materials and to implement a variety of competency-based program delivery strategies. This resource person's guide is designed for people who have either decided to go ahead and implement a competency-based administrator education (CBAE) program or who are giving serious consideration to the implementation of such a program. It addresses the major areas that are of concern to persons involved in the planning and operation of CBAE programs.

Several persons contributed to the development and field critique of this guide, which is another product of the multistate Consortium for the Development of Professional Materials for Vocational Education. Robert E. Norton, Consortium Program Director, assumed major responsibility for developing the manuscript and making revisions based upon the field critiques. Recognition also goes to Carol J. Spencer, Graduate Research Associate, who drafted portions of the manuscript; and to Lois G. Harrington, Program Associate, who made valuable suggestions for the document's improvement and helped refine it for publication.

A special note of thanks goes to Calvin Cotrell, Dominic Mohamed, James Parker, Bill Gooch, Carl Gorman, and Vincent Feck for their leadership in developing the vocational administrator training programs referenced in this guide. Their willingness to share materials and information about their programs and to provide constructive critiques of the guide was most valuable. Others who contributed through their service as either state representatives to the Consortium or as field-test coordinators include Edward Allen, Mary Ann Lynn, Robert Kerwood, and Robert Bendotti.

Credit also goes to Jacqueline Cullen, Helen Lipscomb, James Haire, and Karen Atkinson who, as state department of education liaisons, supported their states' involvement in the Consortium. Thanks also go to the many teacher educators and local administrators of vocational education who participated as resource persons and trainees in the various leadership training programs described in this guide. Their involvement helped greatly in determining what does and does not work in CBAE programs.

Finally, credit goes to Ferman B. Moody, Associate Director for Personnel Development, for his administratiave assistance; and to Shellie Schreck, Consortium Program Secretary, for her patience and expertise in processing the many words contained in this guide.

Robert E. Taylor
Executive Director
The National Center for Research
in Vocational Education

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INTRODUCTION

The critical demand for competent leadership at all levels in education has caused many researchers and administrator educators to look for new and alternative approaches to the preservice and inservice preparation of principals, superintendents, directors, department heads, deans, and other educational administrators. In the last ten years, a significant number of research and development efforts have been undertaken by both general and vocational educators to develop new concepts and to devise more effective approaches to the preparation of our educational leaders. This guide addresses, in considerable detail, competency-based administrator education (CBAE)--believed by many to be the most promising alternative available.

Lipham (1975) conservatively estimated that as many as one-third of the departments of educational administration throughout the United States were "reconceptualizing and recasting certain components of their training programmes in ways congruent with C/PBAE (p. 279)." This trend was particularly prominent in institutions where (1) there was also a strong emphasis on competency-based programs for teachers and (2) close working relationships existed between and among professional educators in teacher training departments, administrator education departments, and state departments of education.

Miller, in a 1972 review and synthesis of the research on the preparation of vocational education personnel, stated "that leadership development, instructional activities and procedures should be competency-based and not course-oriented." He also reported that there was, at that time, both a dearth of competency identification studies and an almost total lack of instructional materials that were competency-based, transportable, and field-tested.

The Challenge

The improvement and expansion of local vocational-technical programs require the preparation of increasing numbers of new administrators who are competent in the complex and unique skills needed to successfully direct these programs. It is also essential that current and future administrators of vocational education have frequent opportunities to upgrade their skills in order to be prepared to develop and manage vocational-technical programs that are relevant and responsive to constantly changing individual and community needs.

The task of administering vocational-technical programs is made more complex not only by expanding enrollments, but also by the many changes occurring in the role and scope of vocational education. The need for educators to develop closer, collaborative working relationships with persons from business, industry, labor, government, and the military calls for special new administrative abilities and knowledge. Increased attempts must also be made to serve students with exceptional needs (e.g. students enrolled in programs

nontraditional for their sex, ethnic and racial minorities, the economically disadvantaged, and the physically handicapped). At the same time, new challenges are being presented to vocational education leadership as a result of rapid technological changes, a growing concern for economic growth and industrial productivity, and in many cases, reduced federal and state budget allocations.

While vocational administrators must deal with many of the same tasks as general-education administrators, research has shown that they must also deal with a significant number of tasks that are unique to vocational education. This suggests that, while university courses in general-education administration are helpful, they are not adequate in themselves. A study conducted by Kaufman and others (1967) found that "the best programs in occupational training and education were those in school systems where the administrative staffs were rated highest in their education, training, and experience in the sound principles of vocational education." Vocational programs were found to be weakest in the school systems where the administrators had training and experience only in general education.

Recognizing the need to prepare vocational administrators in the competencies unique to vocational and technical education, a number of states--including Pennsylvania, Florida, Illinois, Minnesota, and Arkansas--have established training and/or certification requirements to ensure that adequate attention is given to these skills. Many other states are in the process of reviewing their certification standards. At this point, a brief look at the overall job of the educational administrator should be helpful in understanding the challenges that administrators must be prepared to face.

Dimensions of Administrator Performance

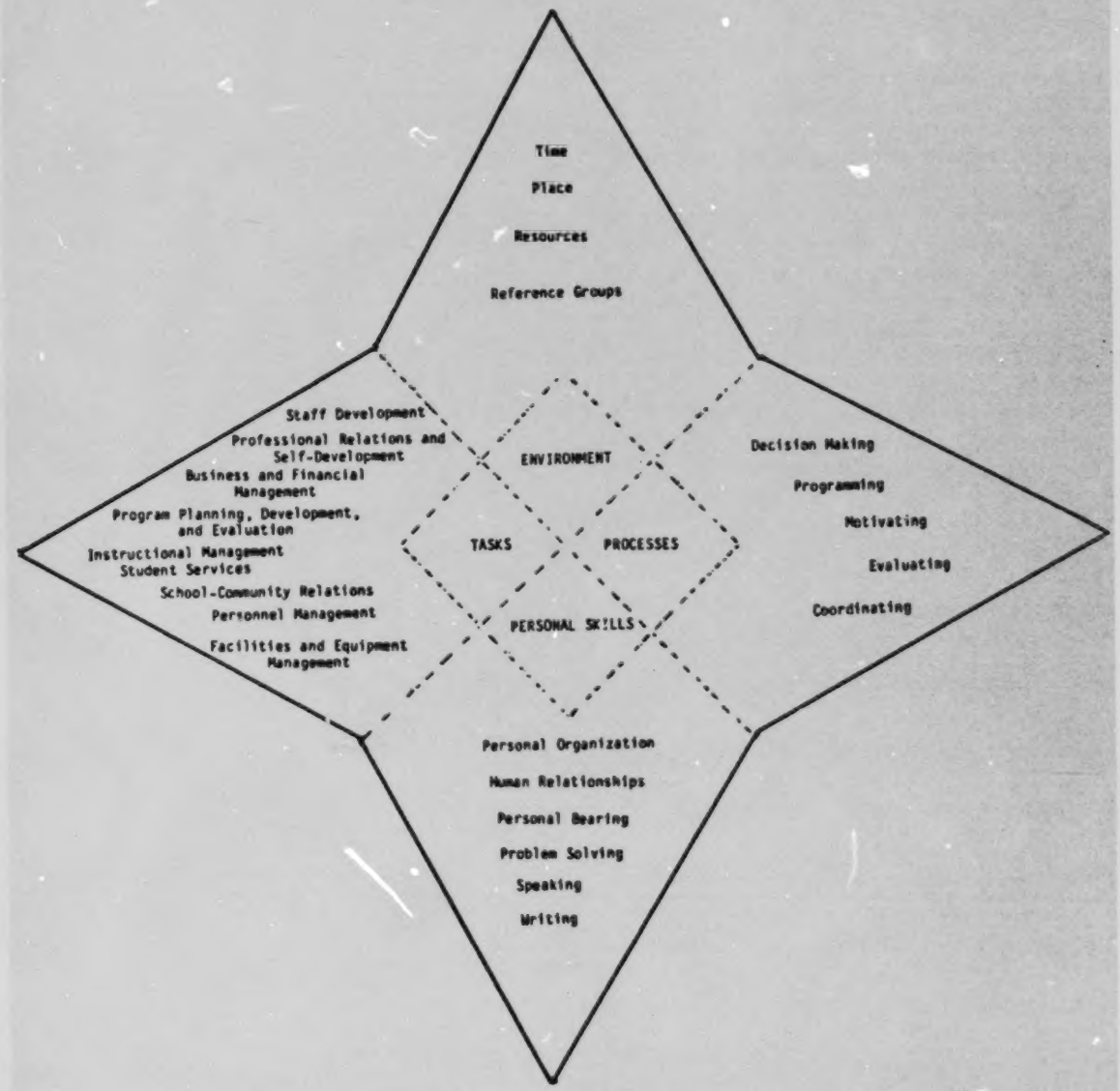
The job of the vocational administrator may be viewed as consisting of four major dimensions as follows: (1) a task dimension, (2) a process dimension, (3) an environmental dimension, and (4) a personal skills dimension. The interrelationship of these four dimensions is graphically depicted in sample 1.

Task dimension. The task dimension describes what an educational administrator has to deal with. Over the years, researchers generally have agreed upon the broad areas of responsibility that typify the roles of educational administrators. Those areas commonly listed are (1) school-community relationships, (2) student-personnel, (3) staff-personnel, (4) curriculum development, (5) physical facilities and equipment, (6) finance and business management, and (7) organization and structure (Gephart et al., 1975, p. 55). All these broad categories can and have been broken down into more explicit competency (task) statements by researchers. These competency statements can then serve as a base upon which to plan programs, develop training materials, and assess trainee performance.

Process dimension. In a similar manner, the process dimension has been used to characterize how an administrator performs the various tasks. These

SAMPLE 1

DIMENSIONS OF VOCATIONAL EDUCATION ADMINISTRATIVE PERFORMANCE



processes, which cut across all the broad areas of responsibility, include activities such as the following: (1) decison making, (2) programming, (3) motivating, (4) coordinating, and (5) evaluating (Gephart et al., 1975, pp. 56-63). Such processes describe the major actions taken by educational leaders and other managers to accomplish their administrative duties and tasks. These processes may also be broken out in more detail.

Environmental dimension. A third important dimension of the administrator's job is the environment in which the job is actually carried out. In spite of basic similarities in tasks and processes--even in job descriptions--experienced administrators know how different one job may be from another. And, although formal preparation in educational administration is fairly uniform across the country, real-world demands require each administrator to relate that preparation to his/her actual situation in a way that may be quite different from that of other administrators.

The environment includes the time, place, resources, and reference groups that make up the specific institutional setting within which an administrator must perform. No institutional environment is exactly like any other. The administrator of a wealthy urban vocational school simply behaves differently than a principal in a small town with limited resources. The principal in a small town may, for example, interact directly with citizens. He/she may be obliged to attend--even lead--local organization meetings and to tailor educational programs to reflect conservative, time-honored values. The large-city director may, on the other hand, be less visible to the community but have cumbersome bureaucratic processes to contend with.

Personal skills dimension. There is a fourth dimension that strongly influences the administrator's performance. All administrators bring their own personal style and skills with them as they fulfill their roles. Some of these personal skills can be changed (e.g., self-discipline, speaking, and writing skills), whereas other characteristics (e.g., physical stature, voice, gender, and stamina) usually cannot be modified. The following are some of the personal skills that can significantly influence an administrator's performance:

- Writing--Preparing reports, proposals, regulations, and plans
- Speaking--Making presentations, reports, and speeches before small and large groups; conducting interviews or conferences
- Human relationships--Dispensing praise and criticism (motivational skill), listening and observing, empathizing with the personal stress of others, eliciting and providing feedback, reconciling personal values with those of others
- Problem solving--Negotiating and compromising skills, cooperative problem solving, staff conflict resolution, handling of organizational change and stress, effective use of persuasion
- Personal organization--Goal setting, time management, record keeping, delegation of tasks, self-discipline

- Personal bearing--Physical health and stamina, appropriate dress, professional conduct, charisma

The four dimensions of the administrative role presented here are not discrete--each is influenced by the other three. Together, however, they provide a fairly comprehensive framework of what administrators must do (tasks), how they must do it (processes), and the personal and environmental factors that affect their level of performance. The challenge facing administrators and administrator educators is obvious.

Concerns About Administrator Preparation

Before looking at new approaches to preparing vocational education leaders, it is important to review at least some of the problems and concerns that have hampered effective training in the recent past. Some of the more frequently mentioned concerns have been as follows:

- Only limited research had been conducted to identify the competencies really important to vocational-technical administrators.
- A number of complex and unique skills are required to successfully manage vocational-technical institutions.
- Few training materials existed that addressed administrative concerns as they apply specifically to the management of vocational-technical programs.
- Only limited educational opportunities were available in most states for the preservice or inservice preparation of vocational administrators.
- Most administrator education programs and courses focused primarily on the needs of the general-education principal and superintendent.
- Many administrator education programs focused on the theory of administration in general, rather than addressing the knowledge, skills, and attitudes required to perform actual administrative tasks.
- Most inservice education programs were campus-based, group-paced, and inflexible concerning the time at which study was offered.
- Once on the job, there was very little time available to administrators for professional development activities.

While other concerns, such as archaic certification requirements and the lack of adequate incentives, could also be listed, the previous eight factors account for most of the major challenges facing vocational administrator educators.

As one might expect, these concerns prompted a number of persons in universities, state departments of education, research and development centers, and the U.S. Office of Education to develop and support various projects designed to resolve or at least reduce the problems outlined. Considerable

research has been done, many competency-based instructional materials have been developed, and an increasing number of vocational-technical administrator training programs have been implemented.

In what has become the major vocational education research and development effort undertaken, in 1978 The National Center for Research in Vocational Education joined with several states to form the Consortium for the Development of Professional Materials for Vocational Education. The Consortium's purpose has been to address the serious need for providing effective leadership training for vocational education personnel.

Consortium efforts have focused on the systematic development of competency-based administrator education (CBAE) materials and programs that can provide a viable alternative to the traditional programs. Most of the remainder of this guide is devoted to an explanation of the CBAE concepts, research conducted, and the instructional materials and delivery strategies that have been developed by members of the Consortium to implement CBAE.

Chapter I

AN OVERVIEW OF CBAE CONCEPTS, RESEARCH, AND MATERIALS DEVELOPMENT

Competency-based education (CBE) is one of the most significant educational movements that has surfaced within the last fifty years. CBE has been endorsed at the local, state, and national levels, and it is capturing the attention of many international educators. It is a rapidly growing and sustained movement that is changing the way we are educating many students at the secondary, postsecondary, higher education, and adult education levels.

During the 1970s, endless numbers of vocational-technical programs in many states converted or began to convert their programs to the CBE approach. Similarly, hundreds of teacher education programs in both general and vocational education have moved totally or at least partially to the use of the CBE approach. These teacher education programs are commonly referred to as CBTE (competency-based teacher education), CBSD (competency-based staff development), or PBTE (performance-based teacher education) programs.

CBE is an alternative to the conventional approach to instruction, which has all too often meant frustration and failure for too many students. Widespread dissatisfaction with the conventional teacher-centered, content-focused, and time-based programs has given impetus to the movement. CBE provides for effective and efficient learning by employing the learning principles of motivation, individualization, reinforcement, self-pacing, recognition of differing learning styles, frequent feedback, opportunities for practice, and active participation.

CBE programs also strive to make time the variable and learning the constant. Traditionally, we have been satisfied with regarding the amount of learning achieved as the variable, and the number of hours or weeks devoted to learning as a constant. One of CBE's major thrusts is to reverse this approach by (1) determining what knowledge, skills, and attitudes are really essential to successful performance in the work world and then (2) designing a time-variable, open-entry/open-exit program that allows all learners to achieve the necessary competence.

All competency-based programs--whether they are designed for the preparation of secondary students, teachers, engineers, doctors, administrators, or other professionals--are guided by five essential elements as follows (AACTE, 1974):

- Competencies to be achieved are identified, verified, and made public in advance of training.
- Criteria and conditions for the assessment of competency are specified and made public in advance.

- The instructional program provides for the individual development and assessment of each of the specified competencies.
- Final assessment considers the knowledge and attitudes of the learner but requires actual performance as evidence of ability.
- Learners progress through the program at their own rate by demonstrating their ability to perform the required competencies.

In addition to the basic characteristics of CBE, there are several other desirable characteristics that are also closely associated with most CBE programs. Tersely stated, the desirable characteristics are as follows (AACTE, 1974):

- Instruction is individualized to the maximum extent possible.
- Learning experiences are guided by frequent feedback.
- Emphasis is on helping the learner achieve program exit requirements.
- Modules or other individualized learning packages are used as part of the instructional process.
- Both required and optional multimedia learning activities are used to provide for different learning styles and preferences.
- Criterion-referenced, rather than norm-referenced, evaluation procedures are used.
- Instruction is, to a considerable degree, field-centered--based on actual work tasks and situations.
- Program planning and evaluation are systematic and continual.

Important Definitions

Many different terms are associated with the competency-based movement. A few key terms have been selected (see sample 2) that are fundamental to understanding the movement and the language associated with it. Fortunately, there is considerable agreement about most of the terms and definitions used to describe and characterize the important concepts and components of CBE. A review of these terms should be helpful, as most of them are used throughout the remainder of this guide.

CBAE Concepts

For some persons, an in-depth review of the five essential elements of CBE as they apply to CBAE (competency-based administrator education) would be helpful. For others interested in CBAE programs, such a review is not necessary. In an attempt to meet the needs of both types of readers, the essential elements and desirable characteristics have been simply listed here; more in-depth information about CBAE concepts is provided in Appendix A.

SAMPLE 2

SELECTED CBAE TERMS

Activity, Operation, or Step--One or more of a series of actions necessary to complete a task.

Competence--Achievement of the knowledge, skills, and attitudes required by a worker in order to perform a given occupational task.

Competency--A meaningful unit of work activity that is discrete, observable, and performed within a limited period of time, and that leads to a product, service, or decision. Also frequently called a task statement.

Competency-Based Administrator Education (CBAE)--An instructional program for preparing school administrators that adheres to the essential elements and desirable characteristics of competency-based education. Programs of this type are also sometimes called performance-based administrator education (PBAE).

Competency Profile--A graphic portrayal of all the duties and associated task statements important to workers in a given occupation. An occupational profile chart is used by many institutions to record competency attainment and to help assess student needs. Also used are the terms task list, occupational profile, and occupational inventory.

Criterion-Referenced Measure--The standards, established in advance of instruction, that will be used for assessing the students' development of the skill, knowledge, and/or attitude as stated in the performance objective. The standards are based on actual occupational standards and do not involve measuring the performance of one student against the performance of other students.

Duty--A clustering of related tasks into a broad category or general area of competence.

Enabling Objective--One of the several process-type objectives that help students progress toward achievement of a terminal objective.

Feedback--A learning activity in which the learner is provided with information about his/her progress through model answers, model critiques, product/performance checklists, or other means.

Job--A specific position requiring the performance of specific tasks--essentially the same tasks are performed by all workers having the same title.

Learning Activity--The required and/or optional learning steps that the student takes in completing a learning package.

Learning Package--A generic term used to describe the many types of student learning materials used in most CBE programs. Two commonly used types are learning guides and modules.

- Learning Guide--A type of learning package that usually contains a terminal objective, enabling objectives, directions for learning activities, a listing of the external supportive resources needed, and evaluation activities. While learning guides are developed in a wide variety of formats, most are dependent upon external resources to provide the essential content needed.

- Module--A type of learning package that usually includes a terminal objective, enabling objectives, essential cognitive information, and evaluation activities. While modules are developed in a wide variety of formats, most are self-contained, transportable, and designed for either individual or group use.

Occupational Analysis--A process used to identify the tasks that are important to workers in any given occupation. A number of alternative and acceptable approaches to occupational analysis are available. Also frequently called job analysis.

Performance Checklist--A list of specific criteria, usually based on actual occupational standards, that is used to evaluate the process used and/or product developed by a worker when performing an occupational skill.

Performance Objective--A statement describing desired student performance, the conditions under which the performance is to occur, and the criteria by which the performance will be evaluated. The student is expected to be able to do something, rather than to simply know something. Thus, while knowledge is required in order to perform correctly, emphasis is place on observable behavior.

Resource Person--The professional educator who is directly responsible for guiding trainees and helping them plan and carry out their professional development programs.

Skill--The ability to perform occupational tasks with a degree of proficiency within a given occupation. Skill is conceived of as a composite of three completely interdependent components: cognitive, affective, and psychomotor.

Task Analysis--The process of analyzing each occupational task (identified through occupational or job analysis) to determine the knowledge, attitudes, and skills required of workers performing it.

Verification--The process of having experts review and confirm or refute the importance of the task or competency statements identified through occupational analysis. Reviewers are usually selected from the ranks of practicing workers and their immediate supervisors. This process is also sometimes referred to as validation.

It is important to recognize, however, that there are two major similarities and two major differences between CBE and CBAE programs. The two similarities are that the same essential elements and the same desirable characteristics underlie both types of programs.

One of the major differences is the clientele involved. Generally speaking, CBE is used to refer to competency-based programs for secondary or postsecondary students in general or vocational education. CBAE, on the other hand, is used to refer specifically to competency-based administrator education programs (some also use the acronym to refer to competency-based adult education).

The other major difference concerns the competencies addressed. In CBAE, the competencies are the professional leadership tasks that vocational administrators must be able to perform. In CBE programs for secondary and postsecondary vocational students, on the other hand, the competencies are the technical tasks that skilled workers are expected to perform while employed as mechanics, technicians, and so on.

CBAE Research

The identification and verification of the competenices required of successful vocational administrators is essential to the education of administrators, no matter what process is used. Before administrators can be taught to perform essential tasks, we must be certain what those tasks are. Then the competencies to be achieved should be used as a basis for needs assessment, instructional materials development, and program planning.

Since the various persons reading this guide will have varying degrees of interest regarding the research done to identify the competencies important to vocational administrators, only a brief overview of the National Center's USOE-sponsored competency identification and verification project is presented here. The reader interested in more detailed information about CBAE research in vocational education is referred to Appendix B and/or to the report prepared by Norton et al (1977a).

The National Center's study of the competencies important to secondary and postsecondary administrators of vocational education resulted in a list of 166 nationally verified competencies, which have been used by many states and universities as one source of identifying the competencies to be addressed in their leadership development programs. These 166 competencies (see Appendix C) later became the structural base for the development of a comprehensive set of modularized instructional materials, under the sponsorship of a multistate Consortium.

The identification of competencies was based upon input from a select group of experienced vocational administrators participating in a DACUM (Developing A Curriculum) workshop and on the results of an extensive and comprehensive literature search and review. The merger of the DACUM and literature review task statements resulted in a list of 191 task statements

that described all known functions and responsibilities of secondary and postsecondary vocational administrators.

These task statements were submitted by questionnaire for verification to a select national group of 130 experienced secondary and postsecondary administrators of vocational education. A total of 92 percent of these administrators responded to the verification questionnaire and indicated that 166 of the 191 statements described competencies important (median score of 3.0 or higher) to the job of vocational administrator. These competencies were clustered into 30 competency areas for materials development purposes.

Development of the CBAE Modules

As with the topics of CBAE concepts and research, only a brief summary of the procedures used to develop the CBAE modules is presented here. For more detailed information about the development procedures used, the major components of the modules, and the supporting materials developed, see Appendix D.

With the completion of the research phase of the National Center study, 166 competencies had been identified and verified as important to administrators of vocational education. However, well-developed instructional materials that addressed the competencies were still lacking. Since the USOE-sponsored study also included a second objective dealing with the development of a series of prototypic competency-based instructional packages, work immediately began on the development of six modularized packages, covering 28 of the identified competencies.

The 166 competencies were first further clustered into logical groupings to form a realistic base for curriculum materials development. Tasks that were closely related to one another could most logically be addressed in a single instructional package.

The six prototypic modules were drafted by National Center staff and selected consultants. They were reviewed by other experienced curriculum specialists and revised in preparation for field testing. Field testing occurred at four different locations--Kent State University, University of Tennessee, Utah State University, and Ohio State University--and within different types of instructional programs. The response of both the trainees and resource persons to the six modules was very positive (Norton et al., 1977b).

Some of the strongest support for the modules came from persons in states that were already moving toward the implementation of competency-based professional development programs for teachers. There was a consensus among many involved and concerned persons that development of the additional modules needed to cover the remaining competencies should begin immediately.

Because funding for this purpose was not available from the federal government, seven states (Florida, Illinois, Ohio, New York, North Carolina, Pennsylvania, and Texas) joined with The National Center for Research in

Vocational Education in September 1978 to organize the Consortium for the Development of Professional Materials for Vocational Education. Other states that later joined and sponsored the Consortium for one or more years include Arizona, Kansas, and Michigan. The Consortium member states and cooperating universities combined their efforts to financially and professionally support the cooperative development, field testing, and revision of additional materials, as well as the implementation of several types of competency-based training programs for vocational administrators.

A total of 29 modules have been developed and are currently available from the American Association for Vocational Instructional Materials (AAVIM) in Athens, Georgia. For a comprehensive listing of all the modules and supportive materials available from AAVIM see the outside back cover.

Nature of the Instructional Materials

Educators often ask, "What is different about these materials that merits my consideration of their use?" The most important difference is that the materials have been designed specifically for the preparation of vocational administrators. They emphasize the role of the vocational administrator, and they focus on administrative concerns as they apply to vocational education. Some of the major structural features of the modules developed by the Consortium, which also make them different from most other administrator training materials, are as follows:

- Modularized--The materials are packaged in modular form, thus providing for maximum flexibility in terms of selecting the competency or competencies most relevant to a trainee's needs.
- Self-contained--All or nearly all the information, work sheets, case studies, samples, model answers, and other items needed are contained within the modular package for ease of use.
- Competency-based--By basing the modules on verified competencies, there is solid assurance that the modules address the important competencies needed by vocational administrators.
- Essential information--The information sheets within each module provide only the "essential-to-know" information in order to enhance learning efficiency. Additional selected references and optional readings are identified for the person wanting to pursue a topic further.
- Theory and practice combined--The modules provide opportunities to gain the necessary attitudes and knowledge, and then in subsequent learning activities, require the trainee to apply that knowledge to actual administrative tasks.
- Required and optional activities--To provide some flexibility for both the trainee and resource person and to accommodate individual learning styles and preferences, a variety of optional learning activities are provided in most modules.

- Criterion-referenced evaluation--Each learning experience in each module includes some type of criterion-referenced device to provide immediate feedback to the trainee.
- Demonstration of competence--The final learning experience of each module provides for the assessment of the trainee's performance in an actual administrative situation, measured against specified professional standards.

There are also four other process-type factors that help to characterize the nature of these CBAE materials:

- Cooperatively developed--This development process permitted tapping the best technical expertise available from throughout the country and served to keep the intended users of the materials oriented.
- Field tested--The extensive field-review and field-testing procedures that were utilized enabled the developers to revise and improve the quality of the materials beyond that which would otherwise have been possible.
- Group or individual use--The design of the modules makes them suitable for either individualized or small-group use.
- Preservice or inservice--The materials are equally suitable for use with preservice and inservice administrator trainees.

Chapter II

ALTERNATIVE CBAE DELIVERY SYSTEMS

The need for improved, more accessible and relevant training programs for preservice and inservice vocational education administrators is widely recognized. Only a few states such as Illinois, Oregon, and Ohio have had established vocational education leadership development programs for ten years or more. While this accurately describes the limited training opportunities available in many states, it does not reflect the fact that a wider range of delivery strategies is presently available, some of which hold great promise for improving the preparation of vocational administrators at the secondary, postsecondary, and state levels. In the last few years, Pennsylvania, Florida, Arkansas, and a few other states have made excellent progress toward establishing continuing and successful internship or externship administrator training programs for their vocational personnel.

The transition to CBAE requires that a number of fundamental decisions be made by the state department of education and the educational institutions contemplating this change. There are several basic patterns for implementing CBAE, with an almost infinite number of possible variations. The CBAE approach can be installed fully or partially, incrementally or all at once. The program planners need to study the possible alternatives, and if possible, obtain consensus on a logical course of action. It is likely that each state's approach to a delivery strategy, and even each institution's approach within a given state, will be somewhat different.

Changing an existing traditional program of administrator training to one employing the concepts of CBAE may present a more difficult challenge than establishing a completely new program. There may be facilitating elements such as an innovative faculty, a supportive administration, encouragement and financial support from the state agency, and the strong support of professional organizations. There may also be a number of serious constraints such as a shortage of funds, a lack of state agency support, failure to recognize the need for improved or expanded training opportunities, or reluctant faculty or administrators who doubt the merits of the CBAE approach or who are threatened by the need for change.

Combinations of these and other factors will exert their influence on any decisions made: delivery strategy or strategies adopted, speed of change to CBAE, and exact nature of the particular program. To give you an overall frame of reference, let us first look at two descriptions of idealized CBAE programs--one preservice and one inservice, Then, we will look at some of the major, effective alternative delivery strategies available, namely:

- Internship programs
- Externship programs

- Graduate courses and programs
- Workshops and seminars
- Independent study/self-study

An Idealized Preservice Program

If one could install a preservice CBAE program--starting with a "clean sheet of paper," as it were, and incorporating all the essential concepts of CBAE in all aspects of the program--it would follow many of the procedures and exhibit many of the characteristics described below. This program description assumes the removal of all the traditional constraints of course structure, administrative procedures, and certification requirements.

- Each trainee's professional preparation is individualized and personalized. To complete the program, trainees must be able to demonstrate the predetermined administrator competencies but do not have to take any one prescribed set of learning experiences.
- Each entering participant confers with a resource person (an administrator educator), and together they (1) examine the required and recommended competencies previously identified and (2) plan a program based on the trainee's personal professional needs, interests, and goals.
- All trainees are expected to demonstrate a central core of administrator competencies. Other designated competencies, while recommended, are negotiable and are considered optional.
- As each trainee progresses through the CBAE program, his or her objectives may be replanned on the basis of personal development, his/her success in the program, and needs determined by his/her experiences in the school or college.
- There are no formal courses in the administrator education program. Instruction and performance assessment are provided through high-quality, tested modular materials, with trainees free to select or design optional or alternate learning activities in order to acquire the necessary competency. The resource persons also provide alternate and enriching learning experiences such as field trips, presentations, and observations.
- Resource persons are readily available to assist trainees in working through module learning activities, to suggest additional experiences, to critique products and performance, and to help solve procedural problems.
- Regularly scheduled seminars, involving administrator trainees and resource persons, are held to discuss mutual problems, share ideas, and improve interpersonal skills. Seminar groups are designed to provide a home base and reinforcement for what is basically an individual effort.
- Trainees begin their field experiences in secondary and postsecondary schools early in their educational program. Field experiences continue

throughout the program. Trainees are at a field site first as observers, aides, and assistants. Later, they serve as interns, with increasing responsibilities.

- Skilled practitioners--administrators in the local and state agencies--are part of the administrator education staff and function as resource persons.
- Secondary and postsecondary schools are an integral part of the administrator education program. In addition to providing field experiences for trainees, they receive university help in upgrading the skills of their own professional staff.
- Trainees progress through the program at a rate based on their own learning styles and achievement. Time is not a factor in a person's program of progress; mastery of competency is. A reasonable schedule for competency attainment, however, should be established with each trainee.
- During the field experience, trainees work on modules and specific objectives. The final assessment of administrative competence takes place in an actual administrative situation. The university resource person or a field-site supervisor may assess trainee performance.
- Credits are awarded to trainees on the basis of the number of modules successfully completed. Each module has an assigned value of a fraction of a semester hour (perhaps one-quarter or one-half a credit hour, depending on the difficulty of the competency and the typical time required to attain it). A trainee is expected acquire a minimum number of credit hours per semester. This procedure can be accommodated within standard university credit systems.
- Letter-grades are replaced by a simple "Pass/No-Credit" system. For trainees who meet the criteria of the modules, the word "Pass" is indicated on their official records. For students not meeting the criteria, no entry is made on their official records.
- Trainees are granted degrees by meeting the institution's standards for demonstrated administrator competencies and accumulating the required number of credit hours.
- Certification of administrators is by program approval, with the state requiring that the prescribed competencies and assessment procedures be described.
- Upon completion of the program, trainees receive a standard certificate and a special CBAE transcript. The special transcript, which is sent to prospective employers, includes (1) a complete record of the administrator competencies demonstrated and (2) evaluations by resource persons of the individual's performance of each competency.

An Idealized Inservice Program

Inservice programs are designed for (1) new or inexperienced administrators needing help in functioning effectively, (2) experienced administrators wishing to upgrade or broaden their preparation, and (3) new or experienced administrators needing to satisfy certification or university degree requirements. An idealized inservice program would follow many of the procedures and exhibit many of the characteristics described below:

- The administrator's professional development program is individualized and personalized. Success in the program is based on demonstrated proficiency, not formal course work.
- The inservice administrator's program of training is based largely on his/her expressed and observed needs, rather than on a prescribed program of studies.
- With the help and guidance of the resource person, the administrator develops a set of competency goals and determines priorities for their achievement.
- A resource person is regularly available to observe the administrator at work, confer about learning activities and problems, and critique the administrator's performance.
- While there are no formal courses, small-group and seminar sessions are arranged to help administrators work on their common professional development problems and discover possible courses of action.
- The administrator proceeds at his/her own rate to complete the modularized learning activities and achieve proficiency in specific competencies.
- The administrator uses his or her own on-the-job situation to practice the administrative skill and to demonstrate final proficiency.
- A qualified resource person (from within the state department or school system or from a university program) assesses the administrator's performance of the competency in the actual administrative situation.
- University credit, professional improvement points, and professional certification are based on achievement of competencies, rather than on completion of formal course work.

The Internship Program

The internship is a preservice and inservice approach to administrator preparation that seeks to provide for more development of knowledge, attitudes, and skills than is possible in only an academic setting. It differs from traditional approaches in its focus on combining academic studies with a planned extended field experience under the direct supervision of a qualified practitioner.

Major Features

The major features of the internship include the following:

- The internship is a phase of professional preparation that usually comes after or in conjunction with some sort of formal program of preparation.
- Interns participate in individually designed programs that include both academic studies and practical field experiences.
- The intern functions under the on-the-job guidance and supervision of an experienced administrator.
- Interns carry real and continuing administrative responsibilities in the field for an extended block of time. During this period, they are assisted in making practical applications of the theory and knowledge components of the training program.
- The internship usually involves placement in another school or district.
- The internship is usually either a full- or half-time, paid position (sometimes the intern is already an employee of the district and is continued on that salary and given some released time for leadership development activities).
- The training program, supervision, and evaluation are cooperatively developed and conducted by the intern, the on-site supervisor, and the sponsoring university.

Procedures

While the procedures followed in existing internship programs tend to vary, the internship approach generally involves the following procedures:

Pre-internship phase. The program begins with a pre-internship phase, which usually involves either (1) a formal program of study (e.g., a full master's degree program in which the internship is the culminating activity) or (2) enrollment in a regular summer session or a three- to eight-week summer workshop on a university campus. This phase can include formal class work, presentations, seminars, small-group discussions, field trips, individual study, and so on--all aimed at giving the participant the fundamental knowledge and skills he/she needs as a foundation for the internship in a field setting.

Internship phase. The internship itself normally extends over an academic year and is spent in the field in a secondary school, vocational-technical center, university, community college, state department, or other institution.

During the internship, the intern engages in a planned program of experiences designed to address his/her professional objectives. The type and

degree of planning prior to the field experience can range from informal agreements between the parties involved, to a tentative list of projects and activities (subject to refinement), to a formal written training plan specifying precise objectives and learning experiences.

The training experiences normally range from activities such as performing routine administrative tasks and procedures, to complicated tasks such as conducting in-depth studies and projects that contribute to both the intern's professional growth and the improvement of the agency in which he/she is working. During the internship, the intern may also participate in periodic seminars and enroll in required and elective courses on campus.

Throughout the year, the intern receives day-to-day supervision and guidance from the on-the-job supervisor. In addition, periodic visits by program staff allow for interaction and consultation between the intern, supervising administrator, and program staff. The progress of the intern is, in this way, observed and monitored; problems and solutions are identified; and a vehicle for intern evaluation exists.

The intern may keep a diary or log of activities and accomplishments and fill out weekly or monthly progress reports as part of the evaluation process. Evaluation is normally a cooperative effort among all parties involved and may include formal assessment instruments and procedures, written narrative reports, or some combination of procedures.

Funding. Funding procedures vary from program to program. Generally speaking, however, the intern pays tuition costs; the other expenses (e.g., the intern's per diem allowance) are shared by the cooperating field site, the state department, and the university. Pre-internship summer sessions or workshops generally carry from three to twelve credits; the field-experience component can carry from four to eighteen or more credits, depending on the amount of course work completed for credit during the internship.

Advantages

There are several advantages to the internship approach. These include, but are not limited to, the following:

- The extended field experience--in which the trainee concentrates a substantial portion of his/her time, energy, and attention to on-the-job administrative responsibilities, problems, and procedures--can result in more in-depth learning experiences than may occur in short-term or part-time clinical approaches.
- Because the intern (although carrying real responsibilities) is considered by field-site personnel and the university sponsor to be a learner making a transition to an increased leadership role, he/she is more free to "try out" or practice the theories and procedures he/she is learning, to make and learn from mistakes, and to adjust gradually to the demands of full administrative responsibility.

- The emphasis on combining academic studies with practical application and the collaboration between university and local educational institution can result in more relevant, realistic training than has traditionally occurred in programs concentrating on theory alone.
- Daily contact and interaction with experienced, competent practitioners can provide the intern with role models and enable him/her to learn from the experience of others. It also allows for the provision of more immediate feedback and more monitoring of progress than can occur in programs without such on-the-job supervision.

Disadvantages

The potential disadvantages of the internship approach include the following:

- Although the internship is usually a "paid" position, the salary is normally either at a token or beginning level, which may entail more of a financial burden than many potential leaders can afford to carry.
- Most internships involve placement in another secondary or postsecondary school or district; the consequent uprooting may also involve more of a commitment than many individuals are willing or able to make.
- Since the experience usually takes place largely in one agency or area, the intern may not (1) receive a broad overview of vocational education, target groups, levels, programs, agencies, and facilities in the state or (2) develop a comprehensive understanding of the interrelationships of these various components in the total vocational education delivery system.
- The effectiveness of the experience depends, to a great extent, on (1) the competence, commitment, and supervisory skills of the on-the-job supervisor and (2) the potential of the field site to provide meaningful and varied learning experiences.

  Suitable training situations may not always be available--or available in sufficient numbers to meet the need. An intern could find him/herself being used as a source of "cheap labor" or limited to performing routine tasks without the necessary opportunity for engaging in in-depth study or significant long-range projects.

Internship programs are currently or recently have been operating in several states, including Illinois, Washington, Ohio, Oregon, Maryland, Pennsylvania, Oklahoma, and Indiana. Brief descriptions of the Illinois, Ohio, and Pennsylvania programs are contained in Appendix E.

The Externship Program

The externship is a preservice and inservice approach to the training of (1) persons likely to move into leadership roles in the district or local

educational agencies in which they are employed and (2) persons already employed as vocational administrators. It deviates from traditional graduate, internship, and inservice training programs in that it includes a planned sequence of course work, directed field experience, and weekend seminars--all of which is carried out while the participant remains employed by his/her present educational agency.

Major Features

The major features of the externship include the following:

- The externship involves a working relationship between (1) state agencies, (2) secondary and postsecondary schools willing to support a staff member in the extern program, and (3) university educators.
- It deviates from traditional graduate programs in that the academic work is designed to supplement and complement field-based activities while the participant is still carrying major responsibilities within his/her secondary or postsecondary institution.
- Each participant is provided with firsthand experience in directing a program planning and evaluation effort based on activities demonstrated to be effective in previous statewide development projects.
- Externs participate in field-based seminars that utilize exemplary and outstanding vocational programs within the state as models for discussion, modification, or implementation.
- Externs develop new leadership competencies in all areas of vocational education through instruction, experiences, and firsthand planning of activities.
- The program is based on group and individual objectives that reflect both personal and local vocational education program needs.
- The program includes speaker presentations and activities dealing with topics, problems, and concerns of the individual participants.
- Experiences in the decision-making process, which will assist individuals in becoming more competent in leadership roles, are included in the program.

Procedures

Following is an overview of the procedures generally followed in conducting the extern program.

Participant selection. Secondary and postsecondary administrators are asked to nominate potential candidates and to make a commitment to support the staff member nominated (to move him/her into a leadership role, provide released time, and contribute financial support).

Summer Workshop. Selected participants attend an on-campus summer workshop (usually for one to three weeks) during which they (1) formulate group and individual objectives and a professional development plan that will structure their extern program, (2) receive instruction concerning such areas as their state's vocational education delivery system, and (3) participate in other activities (e.g., simulated decision-making exercises) designed to prepare them for the field experiences and seminars to follow.

Seminars. During the remainder of the school year, participants attend a series of 9-14 weekend seminars around the state, observing innovative or exemplary programs and facilities, discussing group and individual problems and concerns, and interacting with program personnel and consultants.

Plan of action. Throughout the externship, each extern receives assistance in implementing his/her individual plan of action (developed during the summer workshop) for expanding or improving vocational education in his/her home school or agency. Program staff assist the extern in evaluating his/her progress and provide guidance and coordination as the extern carries out the plan.

Funding. Generally, program costs are shared by the state department of education, the local sponsoring agencies, and the participants. The degree of financial responsibility of each party and the cost to the agencies and externs involved vary from program to program.

Academic credit. Generally available at the option of the participant, academic credit is earned for completing the on-campus workshop (one to three credits) and the directed-field-experience program (two to nine credits). In addition, most programs encourage participants to enroll in related graduate courses during the summer or during a regular fall or spring semester.

Advantages

There are several advantages to the externship approach. These include, but are not limited to, the following:

- It does not require the full-time participation (often at a reduced salary) or uprooting that are required in traditional graduate programs and internships. Potential leaders who are unwilling or unable to make such commitments can be given the essential training needed to move them into leadership roles within a local educational agency.
- By extending inservice training over an academic year, it allows sustained, meaningful planning and implementaion activities to occur. Thus, it has more potential for bringing about more positive change in the individual and in the local agency or district than does attendance at occasional short-term inservice activities (e.g., workshops, conferences) alone.

- Because it (1) offers field-based seminars set in a variety of locations and agencies and (2) involves contact with many different vocational leaders and other persons involved in the total vocational education effort in the state, the externship encourages a comprehensive view of the role of vocational education and facilitates participants' understanding of a variety of service areas, programs, and leadership responsibilities.
- The weekend-seminar structure--in which the same participants live, observe, and work together in an intensive workshop atmosphere periodically over an academic year--allows for meaningful interactions, close working relationships, and sharing of experiences, problems, and solutions--more so than is possible through brief class meetings or traditional workshop encounters.

Disadvantages

Some possible disadvantages of the externship approach include the following:

- The part-time inservice approach--in which participants continue somewhat their regular duties and spend relatively brief periods in a variety of programs and facilitites--may result in a more superficial experience than occurs in full-time leadership development programs.
- The requirement that participants be absent from their local educational institution 10 to 14 days during the academic year may disrupt their work schedules and the normal operation of their home schools/agencies.
- Since most participants are not yet in leadership positions or are new and inexperienced administrators, there is less opportunity for close interaction and sharing of ideas, problems, and solutions with experienced local administrators than is possible in approaches involving more heterogeneous groupings of participants.
- Since formal supervision of the extern is generally handled through periodic visits by program staff, rather than through use of an on-site supervisor, it is more difficult to provide close monitoring of progress, continual feedback, and immediate responses to the needs of the extern.

Externship programs are currently or recently have been operating in several states, including Florida, Oregon, Arkansas, Maryland, Hawaii, and Oklahoma. Brief descriptions of the Florida and Arkansas extern programs are contained in Appendix E.

Graduate Courses and Programs

While course work alone is not sufficient to adequately meet the preparation needs of vocational administrators, it can provide some of the important

background information needed. Since it is believed that most persons reading this guide are already quite familiar with the standard campus-based graduate courses and programs offered in general and vocational education administration, only a few factors will be addressed here.

One of the major advantages of this delivery strategy is that courses in educational administration are widely available. Most colleges and universities that prepare teachers also have a department of educational administration or leadership studies, which offer a variety of courses for the preservice, as well as the inservice, administrator.

Another advantage can be that graduate credit for these courses is almost always available for those persons wanting to make progress toward an advanced degree. A third possible advantage is that, since courses are usually offered each quarter or semester, trainees can enroll when they want (assuming a relevant course is available) for as long as they want, rather than having to commit themselves to a year-long internship or externship.

However, without an opportunity to combine theoretically oriented academic studies with practical field experiences, the competencies needed are unlikely to be fully attained. The trainees may also have to take "what's offered," rather than participating in a program tailored to their needs. Persons attending college full-time often have to forgo their regular salaries, making it difficult or impossible for some to participate. Classes are usually group-oriented, which makes it doubly difficult to meet the needs of a clientele that is usually quite heterogeneous.

In some instances, however, enrollment in a course covering a particular area of concern, in an atmosphere conducive to study and research, may be the best or only available way for an administrator to gain the necessary background information needed.

Workshops and Seminars

A national survey of state directors of vocational education revealed that most states annually conduct one or more workshops or seminars for their administrators. Some of these are planned and conducted primarily by state agency personnel, while others are planned and conducted by a professional association, college, or university. These group training sessions can be especially valuable for focusing on new and emerging needs of administrators or other topics that are of wide common concern.

Workshops are commonly two or three days in length, while seminars are generally one day or less in length. Because of the large numbers of persons usually involved, the training is often limited to information-sharing and discussion. A number of workshops and seminars have been held using one or two of the competency areas addressed by the CBAE modules as the focus of concern.

The disadvantages of this approach include the participants' sporadic, short-term involvement; the lack of opportunities to apply or practice the skill under supervision; and the limited follow-up and impact likely to occur overall. Nevertheless, well-planned and well-conducted training sessions can disseminate needed information to large groups quite quickly.

Independent Study/Self-Study

Two other approaches being utilized, especially by inservice administrators, to gain additional competency are independent study and self-study. The independent study is commonly carried out under the supervision of a university professor who has planned, with the administrator, an individualized, short-term program of study. Credit is usually available on a flexible basis, and the administrator can select those competencies (or modules) that are most relevant to his/her needs.

Perhaps the main disadvantages of independent study are that the administrator will not be able to interact with peers and probably will be largely on his/her own as far as practical application experiences are concerned.

The self-study approach is appropriate only for the strongly motivated professional administrator who does not, for whatever reason, have any other options available. The CBAE modules developed by the Consortium are not designed for this type of use, though even strongly motivated persons can benefit from using them on a self-study basis.

The main disadvantages of self-study are the lack of both peers and a resource person to counsel, discuss, plan, and evaluate the administrator's progress. For some persons, who are located a long distance from one of the other delivery strategies discussed or who have an immediate need for a good reference, the CBAE materials, with their many samples, should be helpful.

Advantages and Disadvantages of CBAE Programs

As a delivery strategy, CBAE has several advantages, including the following:

- It is a flexible approach to administrator preparation. The essential concepts can be implemented in a variety of instructional settings (e.g., in graduate courses, group training sessions sponsored by the state department of education, independent study, field-based intern and extern leadership development program) and with pre- and inservice administrators at all levels.
- The resource persons have a much greater opportunity to work with trainees on an individual and small-group basis. Much of the time formerly spent on preparing and grading cognitive tests--and most of the time formerly devoted to preparing and delivering lectures--can be used to advise, help, and evaluate trainee progress in an individual or small-group setting.

This mode of interaction greatly increases the opportunities available to address and deal effectively with attitudinal domain competencies (i.e., develop interpersonal skills), which are so critical to the performance of successful administrators at all levels.

- Emphasis on clear statements of competencies and criteria helps ensure that trainees know in advance exactly what they are expected to achieve and exactly how they will be evaluated.
- The provision of immediate feedback allows for reinforcement and quick identification of problem areas.
- Program design allows for more individualization of instruction, in that trainees progress at their own rate, have more opportunity to pursue activities according to their own learning styles, and engage in learning experiences designed to meet their needs and interests.
- A large share of the responsibility for learning is shifted from others (e.g., the administrator educator) to the trainee.
- The emphasis on a trainee's ability to perform--rather than only on his/her knowledge of administrative tasks as assessed by paper-and-pencil methods--can help ensure the preparation of more competent administrators. In addition, the identification of explicit criteria to be used in assessing the trainee's achievement of competencies can make the evaluation process more objective than is often the case in more traditional approaches.

There are some disadvantages to the CBAE approach. In some cases, these are not inherent to the strategy, but they can present problems impeding the full implementation of such a program.

- High-quality competency-based instructional materials, designed to deliver on the identified competencies, are necessary if the program is to be individualized--if it is to meet the needs and interests of trainees with a wide variety of personal, educational, and experiential backgrounds. Fortunately, modularized materials that have been designed specifically for training vocational education administrators are now widely available at reasonable prices.
- The whole CBAE approach depends on the accurate identification of (1) the actual competencies needed by local administrators and (2) the criteria and procedures to be used in judging whether the trainee has actually demonstrated his/her achievement of the skill.

  While recent research has identified and verified the competencies important to local administrators, it has not been possible to validate these competencies--that is, to establish that the competencies specified are indeed linked to "successful" administration. New and emerging competencies need to be identified and verified, and the competencies comprising CBAE need to be periodically updated.
- Instructional management in an individualized CBAE program tends to be more complex and difficult than in group-based approaches. The

fact that the number of CBAE programs is expanding is clear witness, however, that with careful planning, effective management is possible.

- Qualified resource persons (e.g., university professors, directors of staff development, state department supervisors, state and local administrators) must be located and trained to assist trainees in the CBAE program, particularly in the assessment of competence. Finding and training an adequate number of persons is a continual process in a CBAE program.

Chapter III

PLANNING FOR CHANGE TO CBAE

Institutions, like individuals, reach the decision to change by proceeding through a series of readily identifiable stages--the change process. The length, complexity, and difficulty of these stages may vary with the institution. Various writers have used their own terminology in labeling these stages, though most are agreed on the basic progression. As applied to the adoption of a CBAE program using the CBAE modules, the phases might take the following form; however, the phases are often not clearly defined, nor are they always approached in an orderly sequence.

Awareness of CBAE. The ideas involved in the CBAE approach are presented to the members of the institution. They become aware of the basic principles and practices but are only passively interested and concerned. Depending on the presentation and their personal backgrounds, they may or may not wish to know more about it. They may still have some misinformation about CBAE.

Examination and study of CBAE. The potential of CBAE is studied, discussed, and examined closely. Further information is sought and acquired. This is the appropriate stage for a thorough examination of the CBAE modules and their developmental base. Group work is organized, and tentative outcomes are identified. A generally positive response is crucial at this stage if there is to be continued progress toward the adoption of CBAE. The program director can assist group members during this phase by facilitating the acquisition of information and bringing in others to help organize the proposed effort.

Appraisal and decision. The staff appraises the potential of CBAE to improve administrator education in the institution and estimates the benefits of such change. A decision must be made at this point about the merit of CBAE and whether the institution should indeed move toward some form of implementation. The program director can provide psychological support, ease tensions, minimize threatening situations, and help bring the decision process to closure.

Trial and experiment. The institution begins to implement CBAE on a trial basis, usually on a small scale. The staff identifies problems, experiments with solutions, and develops some workable modes of operation. Decisions concerning future courses of action are reached and commitments are made during this phase. The program director can bring all available forces to bear in devising solutions and increasing the chances for success.

Adoption and integration. With the completion of a successful trial phase, the institution proceeds to implement CBAE in a larger proportion of the administrator education program. It commits the necessary resources of

staff, funds, and physical facilities to the task. Integration and institutionalization merge as adoption continues. Competency-based administrator education becomes an established and accepted function of the institution.

Change Strategies

During the idealized change process just outlined, the institution (and specifically the program director) can choose from among several change strategies to move the members of the group toward the desired goals. Educational administrators will probably find these strategies familiar enough, but they have special applicability to the implementation of CBAE. Each strategy has advantages and disadvantages that must be weighed to determine the most advantageous action in any specific educational setting.

The decree approach. In this approach, unilateral decisions are made by a person (or persons) in a position of authority. A dean, department chairperson, or project director decides that the administrator education program will move toward implementing CBAE. In some states, the legislature or state education agency may mandate CBAE and prescribe dates for full compliance. Staff members are given specific assignments and deadlines are set. The person in authority breaks any deadlocks that develop and makes final decisions.

The decree approach might be required during the beginning phases of change in order to get a program off dead center, but as the new program develops, it should be needed less. The inherent hazards of this approach--faculty antagonism and resistance--should be apparent.

Replacement approach. Individual staff members desiring not to participate in the CBAE program are allowed to remove themselves from the institution or to accept other responsibilities. Replacement personnel are selected at least partially on the basis of interest and commitment to CBAE. Faculty serving traditional functions in the institution who are skeptical about the potential of CBAE are encouraged to express their opinions and act as a "loyal opposition."

Structural reorganization approach. Initially, this can be a powerful force for change to CBAE. Relationships among faculty and staff can be changed by forming CBAE developmental groups, a special CBAE task force, or instructional teams, thus bypassing the traditional departmental structure. It is possible that internal stresses may develop within the organization, however. This strategy may be less necessary as the faculty members assume more responsibility for the development and direction of CBAE.

Group-decision approach. This involves obtaining group agreement to carry out decisions and solutions made by others. During the early stages of the CBAE program, this may involve a "rubber stamp" procedure, with decisions made by the program director. Later, this process would be used less as various groups make and implement their own decisions.

Data discussion approach. The success of this approach depends on the presentation of relevant data about the program to those involved in the development and implementation of the CBAE model. Program developers furnish the faculty with information as the process continues, and decisions are made by the faculty on the basis of the data. One problem is to furnish the right amount of information so that faculty will neither perceive that they are being overwhelmed nor that vital information is being withheld from them.

Group problem-solving approach. Using this approach, problems are identified and solved through group effort. This may involve group discussion and special outside help. This is the most desirable option, though others may continue to be used as conditions require.

There are a number of specific techniques for advocating change that may be particularly appropriate to a given educational situation. Again, the advantages and disadvantages should be carefully considered before any technique is applied. The educational leader who is working toward the implementation of CBAE may wish to refer to the following publication for a description of implementation techniques: Hull and McCaslin, "Career Education Implementation: A Handbook for Strategy Development."

Transitional Approaches to Implementation

It is usually not possible to formulate complete plans or to solve all installation problems before students are enrolled. A more practical approach is to make some decisions, devise the best plans possible under the circumstances, and then get the program underway, at least on a limited basis. The overall program can be revised and refined in a kind of "rolling change" as experience is gained and formative data are collected. Most institutions, unless they are establishing a new program, will find it easier to develop their CBAE program gradually, using one or more of the following transitional, and probably more feasible, approaches.

The blending approach. In this approach, CBAE modules would be incorporated into existing administrator education courses. The blending may start in a small way, with just one administrator educator using one or more modules as part of one course on a pilot basis. As experience is gained with both the materials and operational concepts, more faculty and more courses can become involved on an incremental basis.

The blending approach can be used to help make others aware of CBAE and to make the conversion to CBAE gradual and, hence, much less threatening. This approach may tend to reduce some of the effectiveness of the modules, but it almost certainly will make the transition process easier and perhaps assure a greater degree of ultimate success. By allowing faculty and trainees to become familiar with their new roles and responsibilities gradually, some of the potential management problems can be resolved before they become major issues or implementation barriers.

Course substitution or course translation. A more advanced method of implementating CBAE is the course substitution or translation approach. This approach takes into consideration the structure of the existing program and provides for change on a course-by-course basis. One, two, or more courses in the professional sequence can be converted to use of the learning experiences contained within a group of modules.

If the course translation approach is adopted, it will be necessary to first study the available modules in order to determine which ones are basically equivalent to the content covered in existing courses. It will also be necessary to come to some definite conclusions about the number of modules that must be completed per credit hour, and on what basis grades will be awarded. Sample 3 shows how the faculty at Southern Illinois University proposed the integration of the entire set of CBAE modules into their existing course structure.

An advantage of the course substitution approach is that one or a few CBAE courses can form a pilot program, without having to reorganize the entire administrator education program. Gradual change is possible, which eases the stresses involved and allows time for solutions to be found and time for people to adjust.

A possible disadvantage is that the benefits of a fully implemented CBAE program may not be realized. Without continued planning and faculty commitment, the courses may return to their former traditional mode. Course substitution, however, may be an excellent way to begin the implementation process successfully, or it might be the only option possible if resources are limited and faculty acceptance is not complete.

Factors to Consider

Before making the final decision to adopt CBAE, your institution must make some critical decisions about such things as potential program design, necessary resources, and program administration. Sample 4 lists several of the critical points that you should examine.

SAMPLE 3

MODULES INTEGRATED INTO COURSE STRUCTURE

SIU-C Courses
General Supervisory
Endorsement (Level I)

COMPETENCY-BASED ADMINISTRATOR EDUCATION MATERIALS
Leadership & Training (LT) Series

	EDL 501	EDL 503	EDL 511	EDL 513	EDL 595	VES 460	VES 466	VES 497	VES 561	VES 562	VES 568	VES 574	VES 595	ELECTIVES
CATEGORY A: PROGRAM PLANNING, DEVELOPMENT, AND EVALUATION														
LT-A-1 Develop Local Plans for Vocational Education Part I									X			X	X	X
LT-A-2 Develop Local Plans for Vocational Education Part II									X			X	X	X
LT-A-3 Direct Program Evaluation	X											X	X	X
CATEGORY B: INSTRUCTIONAL MANAGEMENT														
LT-B-1 Direct Curriculum Development					X							X	X	X
LT-B-2 Guide the Development and Improvement of Instruction		X										X	X	X
LT-B-3 Manage the Development of Master Schedules												X	X	X 1
CATEGORY C: STUDENT SERVICES														
LT-C-1 Manage Student Recruitment and Admissions											X	X	X	X
LT-C-2 Provide Systematic Guidance Services												X	X	X
LT-C-3 Maintain School Discipline												X	X	X 1
LT-C-4 Establish a Student Placement Service and Coordinate Follow-up Studies												X	X	X 1
CATEGORY D: PERSONNEL MANAGEMENT														
LT-D-1 Select School Personnel				X								X	X	X
LT-D-2 Supervise Vocational Education Personnel				X								X	X	X
LT-D-3 Evaluate Staff Performance				X								X	X	X 1
LT-D-4 Manage School Personnel Affairs				X								X	X	X
CATEGORY E: PROFESSIONAL AND STAFF DEVELOPMENT														
LT-E-1 Appraise the Personnel Development Needs of Vocational Teachers	X											X	X	X
LT-E-2 Provide a Staff Development Program	X											X	X	X 1
LT-E-3 Plan for Your Professional Development	X											X	X	X
CATEGORY F: SCHOOL-COMMUNITY RELATIONS														
LT-F-1 Organize and Work with a Local Vocational Education Advisory Council									X			X	X	X
LT-F-2 Promote the Vocational Education Program												X	X	X 1
LT-F-3 Involve the Community in Vocational Education												X	X	X 2
LT-F-4 Cooperate with Governmental and Community Agencies										X		X	X	X
CATEGORY G: FACILITIES AND EQUIPMENT MANAGEMENT														
LT-G-1 Provide Buildings and Equipment for Vocational Education											X	X	X	X
LT-G-2 Manage Vocational Buildings and Equipment											X	X	X	X
LT-G-3 Manage the Purchase of Equipment, Supplies, and Insurance											X	X	X	X
CATEGORY H: BUSINESS AND FINANCIAL MANAGEMENT														
LT-H-1 Prepare Vocational Education Budgets												X	X	X 2
LT-H-2 Identify Financial Resources for Vocational Education	X											X	X	X
LT-H-3 Develop Applications and Proposals for Funding Vocational Education												X	X	X 2
CATEGORY I: PROGRAM IMPROVEMENT														
LT-I-1 Use Information Resources to Help Improve Vocational Education Programs									X			X	X	X
LT-I-2 Use Inquiry Skills to Help Improve Vocational Education Programs									X			X	X	X 1

COURSES

EDL 501 - Education Administration: Tasks and Processes
EDL 503 - Education Administration: Introduction to Theory
EDL 511 - Organization and Administration of Curriculum
EDL 513 - Supervision of Instruction
EDL 595 - Internships
VES 460 - Occupational Analysis and Curriculum Development
VES 466 - Principles and Philosophies of Vocational Education
VES 497 - Practicum
VES 561 - Research
VES 562 - Legislation and Organization
VES 568 - Facilities Planning
VES 574 - Occupational Information
VES 595 - Professional Internship

ELECTIVES

1 EDL 507 - Secondary School Principalship
2 EDL 527 - School Business Administration
3 VES 472 - Organizing Cooperative Education

SAMPLE 4

CBAE PROGRAM CONSIDERATIONS

The Program for Change

- What groups (or individuals) will be most affected by the change to CBAE?
- What persons must be committed to CBAE before it can be implemented?
- How can the cooperation of the faculty and staff be best obtained?
- What groups outside the institution should be informed or consulted about the CBAE program?
- How can outside consultants be used to effect the implementation of CBAE at the institution?
- How can the personal and professional needs of the staff be met in the proposed CBAE program?
- What other efforts will need to be made to facilitate the change to CBAE?

Program Design

- Will an intern or extern type of leadership development program be implemented or will competencies/modules be integrated into existing administrator education courses?
- How can present courses be converted to individualized, competency-based activities?
- How will the administrator competencies be selected for (1) the pre-service program and (2) the inservice professional development program?
- How will module credits and trainee requirements be determined?
- How will "grades" for completed modules be determined?
- How will individual trainee programs be designed?
- How will trainees' preexisting competencies be evaluated and validated?
- How will progress and achievement be recorded?
- What provision will be made for individuals who work at varying rates?
- What other factors should be considered in the CBAE program design?

Management of Instruction

- Who will be used as resource persons in the institution?
- Who will act as resource persons in the schools or in the field?
- How will resource persons be trained?
- How can group activities be organized for inservice training in the field?
- How will the necessary resources be provided for inservice training in the field?
- How will final assessment in an actual school situation be arranged for preservice administrators?
- What arrangements need to be made to ensure that resource persons are conveniently available to pre- and inservice administrators.
- What additional management problems will probably need to be solved?

Resources for the CBAE Program

- What additional (or reorganized) space or facilities will be required for the CBAE program?
- What additional equipment will be needed?
- Will a CBAE resource center be provided?
- What special instructional materials and resources will be needed?
- How can all the needed resources be acquired?
- What are the priorities among the needed resources?
- What other resources are necessary or desired?

Administration of the CBAE Program

- What departmental reorganization is necessary to facilitate implementation?
- What institutional or departmental policies or procedures will need to be changed to accommodate CBAE?
- How shall teaching loads be modified to meet the needs of CBAE?
- What staff duties will need to be changed or added?
- What new staffing requirements will there be?
- How shall certification be awarded under the CBAE program?
- What agreements and arrangements need to be worked out with local school systems?
- What other administrative decisions will need to be made to implement CBAE?

Program Costs and Funding

- How will CBAE modules and instructional resources be purchased?
- How will tuition and fees be assessed?
- What operational costs are involved?
- What program start-up costs are required?
- What sources of additional funds are available?
- How best may available funds be tapped?
- What other financial questions are likely to arise?

Program Evaluation and Refinement

- What arrangements will be made to maintain communication and share data with other CBAE institutions?
- How will trainee reactions and responses to CBAE be obtained?
- What arrangements will be made to gather data on CBAE program effectiveness?
- How will data generated in the program be utilized for evaluating and refining the program?
- Who will be responsible for evaluating the CBAE program?
- What other evaluation questions should be considered?

Chapter IV

THE ROLE OF THE RESOURCE PERSON IN A CBAE PROGRAM

The CBAE approach requires the active presence of a resource person. He or she is vital to making the program work. In the National Center's experience to date, when trainees indicated they disliked working with modules, it was generally because they had been asked to work alone on the modules, unassisted by a resource person or by fellow students. Typical comments include the following:

"I couldn't find any peers to work with"

"Not enough opportunity for interaction"

"Lack of group discussion"

"My resource person was never available"

"I miss discussing things with my colleagues"

Much of the work of local administrators involves interaction with others. One cannot teach administrators to interact effectively with others by giving them a module and requiring them to work in isolation. The CBAE modules were not designed for that purpose. Each module provides basic information and activities, but the resource person is the key to making the modules work. The modules are only one tool in administrator preparation. It is up to the resource person to employ additional learning tools, to provide opportunities for working with others, and to truly individualize the training process to meet the unique needs of each trainee.

The importance of the resource person in CBAE is reinforced by the fact that most programs have found that more than one type of resource person is needed to be most effective. (A later section entitled "Staffing the Program" explains the differentiated staffing patterns used by several programs to fulfill the various resource persons' responsibilities described herein.)

The Tasks of the Resource Person(s)

The resource persons in a CBAE program are responsible for performing such key tasks as the following:

- Orienting trainees to the CBAE program
- Helping trainees select the competencies they need to achieve and the modules they will take
- Assisting trainees in obtaining access to necessary equipment, facilities, and other needed resources

- Arranging small-group and large-group meetings so trainees have a chance to interact
- Helping trainees set up activities with peers or arrange to observe or visit a school administrator
- Providing advice when trainees encounter problems
- Supplementing the material in a given module with materials, presentations, and activities drawn from his/her own expertise as a professional educator
- Providing trainees with feedback when it is needed
- Assessing trainees' knowledge and attitudes--their readiness to perform
- Evaluating trainees' final performance

Let us consider each of these tasks in more detail.

Explaining CBAE to Trainees

In all probability, few of your administrator trainees will be familiar with CBAE, so your first task as a resource person is to introduce them to the concept. People tend to be uncomfortable (even antagonistic) when confronted with something unfamiliar. Before they will accept the new, they want to know what it is, what its value is, and how it will affect them. Consider how you feel when someone asks you to taste something unfamiliar and, perhaps, vaguely suspicious in appearance.

To avoid such a qualmish reaction, you need to explain (1) why you have elected to use modules, (2) how using modules that require performance in an actual administrative situation can help prepare them to carry out their responsibilities, and (3) how your particular program is set up.

Another consideration is that most trainees have been exposed primarily to educational systems involving large-group instruction and teacher-centered instruction. They are accustomed to having the teacher take responsibility for teaching, rather than their having to take responsibility for learning. Therefore, they need to be oriented to the new role they are expected to play and to their new responsibilities for learning.

Helping Trainees Select Competencies/Modules

In CBAE, administrators are evaluated on whether they have achieved a particular skill, not whether they have completed a particular module. Thus, another of your tasks as a resource person is to help trainees identify which modules, or which learning experiences within a module, they need to complete to meet program requirements and their needs. This means that you will have to identify which modules you will use in your administrator training program or course, which are required, and which are optional. You will also have to

meet individually with trainees to determine which competencies they already possess. Sample 5 is an example of a needs assessment instrument that might be used if the assessment is to be conducted in relationship to the 29 areas of competency addressed by the CBAE modules. Another option is to ask the trainees to rate their current skill and training needs in relationship to the 166 competencies in Appendix C. If a trainee already possesses a particular skill, he or she should need only to demonstrate the competency to specified standards without going through the whole module. Sample 6 shows one way to document and verify that the trainee has achieved the competency.

Facilitating Trainees' Completion of Modules

Most of the Consortium-developed administrator modules include activities (generally optional) that call for outside resources. (A list of the optional resources recommended and information regarding their availability may be purchased from the publisher, AAVIM.) It is the resource person's responsibility to see that as many of the optional and recommended references as possible are readily available for the trainees' use.

In addition, a trainee may be asked to participate in a role-play activity with a group of peers. The module may suggest supplementary readings. A module may recommend that the material in the information sheet be discussed further with peers or with the resource person, or that the learner attend an advisory council meeting. A trainee may be told that it would be helpful to meet with an experienced administrator to discuss a particular concept or to observe that administrator demonstrating a particular skill.

Trainees may experience difficulties in carrying out these activities if you have not set up procedures and reasonable time schedules in advance. You need to devise a system for trainees to obtain access to the equipment, materials, peers, resource persons, and situations they need so that they can complete the module without being forced to jump unnecessary hurdles or experience unnecessary delays. This system should also include provision for periodic small-group and large-group discussion sessions. An example of a large-group seminar schedule arranged by a resource person at one university is outlined in sample 7.

Another part of your system must be designed to ensure that a trainee with a problem or question concerning an activity has access to you--or another person designated as a resource--within a reasonable amount of time. Periodic seminars or conferences should be arranged to review progress and resolve any problems. Sample 8 shows one way to record the results of periodic conferences.

It should be noted that, to provide trainees with advice and answers concerning a given module, it is absolutely critical that any resource person be totally familiar with the content and learning activities of the module involved.

SAMPLE 5

VOCATIONAL ADMINISTRATOR COMPETENCY NEEDS ASSESSMENT FORM

Name: _____

Date: _____

For each of the following competency statements, please indicate your:

Competency Statements		Estimate of Your Current Ability to Perform this Competency				Desire to Further Improve this Competency for Your Present Job			
		Poor	Fair	Good	Excellent	Low	Medium	High	Very High
CATEGORY A: PROGRAM PLANNING, DEVELOPMENT, AND EVALUATION									
LT-A-1 LT-A-2	Develop Local Plans for Vocational Education	1	2	3	4	1	2	3	4
LT-A-3	Direct Program Evaluation	1	2	3	4	1	2	3	4
CATEGORY B: INSTRUCTIONAL MANAGEMENT									
LT-B-1	Direct Curriculum Development	1	2	3	4	1	2	3	4
LT-B-2	Guide the Development and Improvement of Instruction	1	2	3	4	1	2	3	4
LT-B-3	Manage the Development of Master Schedules	1	2	3	4	1	2	3	4
CATEGORY C: STUDENT SERVICES									
LT-C-1	Manage Student Recruitment and Admissions	1	2	3	4	1	2	3	4
LT-C-2	Provide Systematic Guidance Services	1	2	3	4	1	2	3	4
LT-C-3	Maintain School Discipline	1	2	3	4	1	2	3	4
LT-C-4	Establish a Student Placement Service and Coordinate Follow-up Studies	1	2	3	4	1	2	3	4
CATEGORY D: PERSONNEL MANAGEMENT									
LT-D-1	Select School Personnel	1	2	3	4	1	2	3	4
LT-D-2	Supervise Vocational Education Personnel	1	2	3	4	1	2	3	4
LT-D-3	Evaluate Staff Performance	1	2	3	4	1	2	3	4
LT-D-4	Manage School Personnel Affairs	1	2	3	4	1	2	3	4
CATEGORY E: PROFESSIONAL AND STAFF DEVELOPMENT									
LT-E-1	Appraise the Personnel Development Needs of Vocational Teachers	1	2	3	4	1	2	3	4

	Competency Statements	Estimate of Your Current Ability to Perform this Competency				Desire to Further Improve this Competency for Your Present Job			
		Poor	Fair	Good	Excellent	Low	Medium	High	Very High
LT-E-2	Provide a Staff Development Program	1	2	3	4	1	2	3	4
LT-E-3	Plan for Your Professional Development	1	2	3	4	1	2	3	4
CATEGORY F: SCHOOL-COMMUNITY RELATIONS									
LT-F-1	Organize and Work with a Local Vocational Education Advisory Council	1	2	3	4	1	2	3	4
LT-F-2	Promote the Vocational Education Program	1	2	3	4	1	2	3	4
LT-F-3	Involve the Community in Vocational Education	1	2	3	4	1	2	3	4
LT-F-4	Cooperate with Governmental and Community Agencies	1	2	3	4	1	2	3	4
CATEGORY G: FACILITIES AND EQUIPMENT MANAGEMENT									
LT-G-1	Provide Buildings and Equipment for Vocational Education	1	2	3	4	1	2	3	4
LT-G-2	Manage Vocational Buildings and Equipment	1	2	3	4	1	2	3	4
LT-G-3	Manage the Purchase of Equipment, Supplies, and Insurance	1	2	3	4	1	2	3	4
CATEGORY H: BUSINESS AND FINANCIAL MANAGEMENT									
LT-H-1	Prepare Vocational Education Budgets	1	2	3	4	1	2	3	4
LT-H-2	Identify Financial Resources for Vocational Education	1	2	3	4	1	2	3	4
LT-H-3	Develop Applications and Proposals for Funding Vocational Education	1	2	3	4	1	2	3	4
CATEGORY I: PROGRAM IMPROVEMENT									
LT-I-1	Use Information Resources to Help Improve Vocational Education Programs	1	2	3	4	1	2	3	4
LT-I-2	Use Inquiry Skills to Help Improve Vocational Education Programs	1	2	3	4	1	1	3	4

SAMPLE 6

COMPETENCY DOCUMENTATION

The following information must accompany each competency you wish to document.

The information below should be attached to the Performance Assessment Form, along with other materials you are including for review.

COMPETENCY DOCUMENTATION BACKGROUND

1. How did you acquire this experience (brief description)?

2. When did the experience take place (date[s])?

   Number of times performed?

3. Who were the recipients of your services (names of teachers)?

4. Who observed the experience (name of supervisor[s])?

5. What evidence are you presenting to verify the experience? (Note: Attach any evidence described.)

SOURCE: Developed and used by Temple University's LIFE Program.

SAMPLE 7

TOPICAL OUTLINE: EDVETEC 730

January 5	Introduction to CBAE and Module LT-D-2, Supervise Vocational Education Personnel
January 12	Discussion of Module LT-D-2; review major theories of supervision
January 19	Individal work on LT-D-2 activities; resource persons available for individual/group conferences
January 26	Individual work on LT-D-2 continued; resource persons available
February 2	Introduce Module LT-E-2, Provide a Staff Development Program, and review key concepts
February 16	Individual work on LT-E-2 activities; resource person available to help develop plans
February 23	Introduce Module LT-F-1, Organize and Work With a Vocational Advisory Council; show film
March 2	Discussion on effective use of advisory councils; also resource person visit this week or next
March 9	Individual work on advisory council or other modules as needed; submit written plans
March 16	Written examination (optional), individual conferences to review plans

SAMPLE 8

HELPING CONFERENCE RECORD

Intern/Student _____ Helper _____ Date _____

PROGRESS:

FUTURE OBJECTIVES (date)

COMMENTS:

SOURCE: Developed and used as a full-page three-part form by Temple University's LIFE Program.

Supplementing Module Activities

Modules were designed to be used by professional educators, not to replace them! Administrator educators have been specially trained in the professional and/or technical skills needed by local administrators. Their expertise and experience are essential to the successful use of the modules. As an administrator educator, you are undoubtedly aware of numerous materials and techniques that are effective in teaching particular skills, such as use of presentations, guest speakers, textbooks, periodicals, pamphlets, handouts, simulations, role-playing situations, field trips, videotapes, or other audio-visuals.

As mentioned previously, the resource person must be thoroughly familiar with each module that he or she assigns. During the process of familiarizing yourself with a particular module, you should plan how you can supplement the contents of the module. Don't overlook the use of the optional resources that are listed in the front of each module, nor the use of some of the additional recommended references provided on the inside back cover of each module.

Do you have an excellent handout on the subject? Would trainees benefit from participating in a seminar at some point in the module? Would a large-group presentation enhance the module activities at some point? Do you have additional tips or practical do's and don'ts you need to convey to trainees concerning the skill? Is there additional information, unique to the vocational programs in your state, that they need to be aware of? By asking questions of this type as you review each module, you can make the learning experience more effective for your trainees.

Providing Feedback

Because of the recognized limitations on each resource person's time, the modules, where possible, ask trainees to use self-checks to evaluate their progress, involving the resource person as the evaluator only in the final experience. However the modules remind trainees periodically to check with their resource person if they are experiencing problems. A good time for this to occur is during the individual conferences or during field-site visits.

If trainees do not understand the feedback provided in the module, you need to confer with them. Because some trainees are reluctant to ask for help, the resource person(s) should regularly take time to offer assistance and to spot-check each trainee's progress. By asking specific questions about the module content, you can quickly ascertain whether the trainee understands the competency. Some trainees, unaccustomed to setting their own pace, may try waiting until the last minute to complete their module work, which may seem less pressing. By monitoring their progress, you can detect such problems and initiate corrective measures before the problems become serious.

Assessing Trainee Readiness

Before arrangements are made to have the trainee demonstrate his/her competence in an actual administrative setting, the resource person or persons working with the trainee should make an informed judgment about his/her readiness to perform. If you, as the resource person, have been helping the trainee and monitoring his/her progress through the various learning activities, you should have a good idea of his/her likelihood of being successful.

Before scheduling a final assessment, it is recommended that a short debriefing conference be held with the trainee to review his/her progress on all previous learning experiences. This can be done by reviewing completed self-checks, case study critiques, and any materials that have been developed. You should also orally quiz the trainee to assess his/her knowledge of the important concepts and procedures that are basic to performing the given competency in an effective manner under varied circumstances. This type of debriefing can serve to reinforce essential information and help ensure that the trainee's final performance is not simply a case of mimicking someone else.

If other resource persons have also worked with the trainee, be sure to check with them regarding their reactions. You may also want to ask the trainee to express his or her personal feelings about the competency. The amount of confidence expressed will usually be a good indicator of the trainee's ability to perform effectively. Using as many of these indicators as are available will permit you to make an informed decision about the trainee's readiness.

Evaluating Final Performance

The CBAE modules require that learners prove their competency by meeting specified criteria while performing the skill in an actual administrative situation. It is essential that, when students are evaluated using the Administrator Performance Assessment Form (APAF) in the final experience, the evaluator is qualified to use this form effectively. This means that administrator educators should be familiar with these forms in advance to increase the consistency of the ratings and that other persons who are asked to use these forms (e.g., on-site supervisors) be trained to use them properly.

Since a trainee's competency is assessed during the final experience of each module, it is essential that these forms be used appropriately, objectively, and consistently. The following procedures for evaluating a trainee's final performance have been utilized by experienced resource persons to help ensure fair and objective observation:

- Be thoroughly familiar with the content and learning activities of each module used.
- Become as informed as possible about the administrative setting of each intern or extern trainee.

- Be certain that each trainee is aware of all the criteria to be used in the assessment process.
- Review all the trainee's written materials in advance of the assessment conference.
- Use videotaping whenever possible to provide evidence that the trainee has attained administrative process competencies.
- Agree in advance concerning the types of documentary evidence the trainees are expected to provide. The type of evidence appropriate will, of course, depend on the particular competency being assessed. The following are typical examples of suitable evidence: minutes of advisory or board meetings; written plans, guidelines, budgets, and proposals; letters to faculty, administrators, or others; evaluation reports of staff or programs; and audiotapes or videotapes of process competencies.
- Complete the assessment form as soon as possible after the performance, ask the trainee to self-assess, and then either concur with or explain the differences in your ratings.
- During any observation, be as unobtrusive as possible so that others are not adversely affected by your presence.

In addition to the APAF, a summary record of completed work should be maintained. Sample 9 shows one possible approach to this record keeping.

SAMPLE 9

COMPETENCY SCHEDULE AND PROGRESS CHART

NAME

VOCATIONAL ADMINISTRATOR COMPETENCY SCHEDULE AND PROGRESS CHART

SCHOOL

MODULE NO.	MODULE TITLE	COMPETENCIES COVERED	DATES		
			STARTED	EXPECTED COMPLETION	VERIFIED BY: INITIALS
IM-A-1	Develop Local Plans for Vocational Education Part I	1, 2, 5, 16, 17, 27, 30, 31			
IM-A-2	Develop Local Plans for Vocational Education Part II	6, 7, 8, 9, 10, 18, 32			
IM-C-4	Establish a Student Placement Service and Coordinate Follow-up Studies	23, 24, 34			
IM-B-1	Appraise the Personnel Development Needs of Vocational Teachers	61, 62, 63			
IM-D-3	Supervise Vocational Education Personnel	68, 71, 101, 102, 105			

SOURCE: The chart is a portion of a form developed by extern program staff at the University of Central Arkansas, Conway.

The role of the resource person is indeed a crucial one, requiring a change in emphasis and activity on the part of the administrator educator, but certainly not a change in the need to draw upon all of his or her reservoir of information, experience, and training. Modules are not a substitute for the administrator educator, but simply a way to structure, enliven, and enrich trainee learning.

The duties of the resource person are many, varied, and in some ways, demanding. The resource person works with trainees as advisor, helper, and evaluator (see sample 10). If the resource person can accomplish these duties conscientiously and skillfully, the resulting administrator education program can provide an exciting and growth-producing experience for the trainee and a professionally satisfying experience for the administrator educator.

Training of Resource Persons

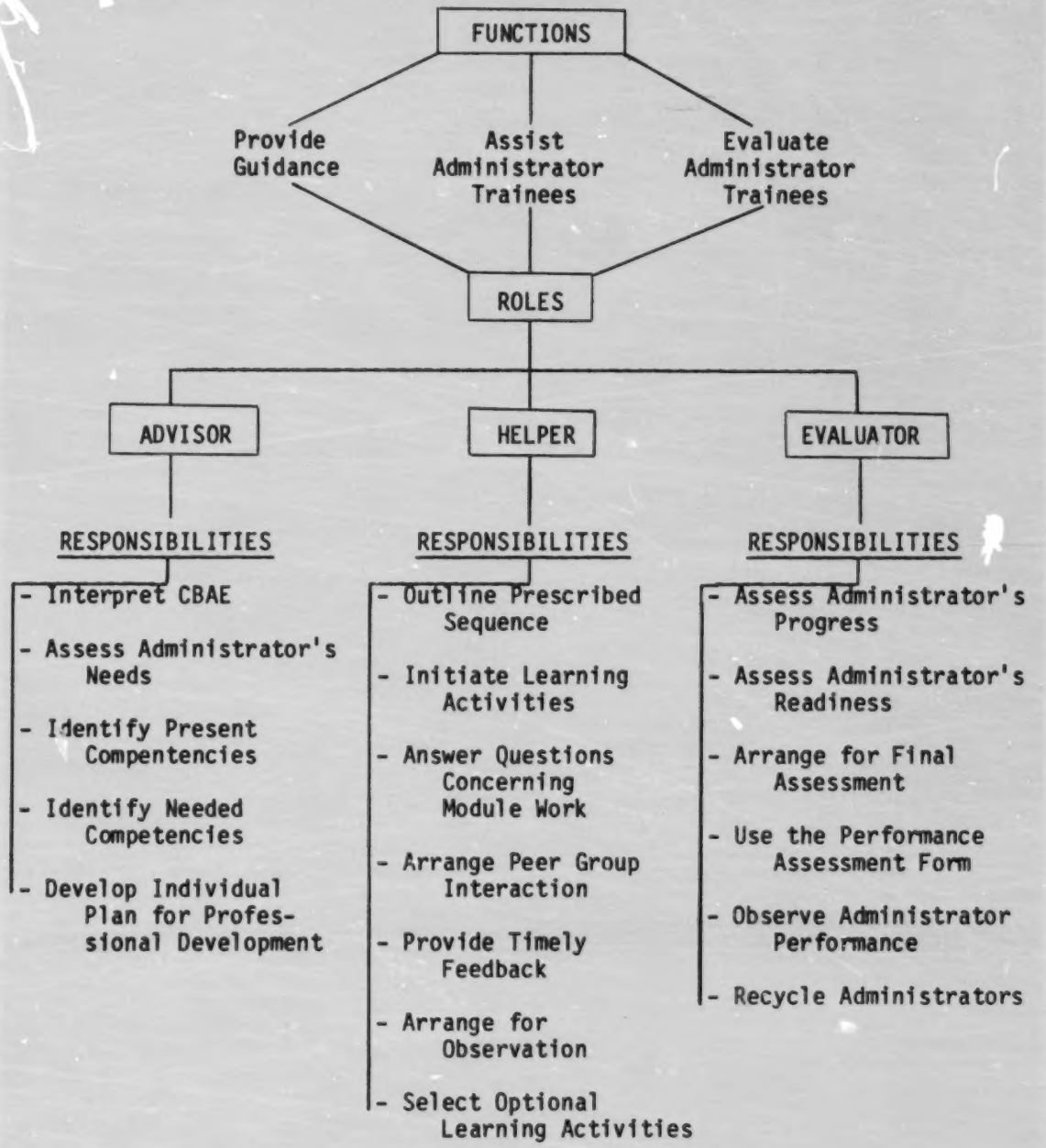
It has been the experience of all CBAE program implementers that the resource person is the single most important element in a successful CBAE program. Good planning and good instructional resources are needed but so are well-qualified and properly trained resource persons. Weak, inefficient resource persons can do more harm than good.

Many persons implementing PBTE (performance-based teacher education) programs--in which effective resource persons are also needed--experienced great frustration when teacher educators were asked to assume new and different roles without being prepared for them. In other institutions, the resource persons were trained for their advising, facilitating, and assessment responsibilities and given an opportunity to interact with experienced resource persons. In those institutions, many potential problems were avoided and more successful and continuing programs resulted.

Therefore, it cannot be too highly recommended that persons who will be assuming the roles of CBAE program director and/or resource person receive adequate preparation for these jobs in advance of having to fulfill the important responsibilities that go with them. Workshops and other forms of assistance for planning CBAE programs and training resource persons are available through the National Center and from the program directors listed in Appendix E.

SAMPLE 10

DUTIES OF THE RESOURCE PERSON



NOTES

Chapter V

MANAGEMENT OF A CBAE PROGRAM

The nature of CBAE concepts and programs creates some new management requirements and calls for the development of some unique relationships among the agencies and the personnel involved. When an educational program becomes more individualized and field-based, utilizes modularized materials, and requires the demonstration of competencies in a real-world setting, new roles emerge for the students, resource persons, and others involved. Whether using CBAE concepts and materials in an intern program, an extern program, or graduate courses, some changes will be necessary, and therein lie the challenges that need to be met.

Management Considerations

There are at least 14 management concerns to be dealt with, as follows:

- Using an advisory or steering committee
- Staffing the program
- Selecting competencies
- Selecting students
- Providing learning facilities
- Maintaining student records
- Assessing student needs and developing individual plans
- Reporting student progress
- Grading students
- Awarding course credits
- Coordinating the multiagency CBAE effort
- Selecting cooperating educational institutions
- Financing the program
- Evaluating the program

Let us look at each of these concerns in more depth, in terms of how some of the CBAE programs that are currently operating have designed their management systems. For more details about any aspect of the specific programs mentioned, you are encouraged to contact the program director of the referenced program.

Using an Advisory or Steering Committee

Anyone contemplating the establishment of a new or significantly different administrator education program should seriously consider organizing an advisory or steering committee to help give direction and smooth the transition to CBAE. The CBAE committee should consist of representatives of all the groups or agencies who will be involved as producers, consumers, or sponsors. In general, this will include administrator educators from each participating university, local secondary and postsecondary administrators, state agency personnel, current and potential trainees, and professional association representatives.

The overall function of the committee members should be to guide the total effort, to present the needs and different viewpoints of their constituent groups, and to help disseminate factual information about CBAE concepts and plans. The amount of responsibility given and the specific duties assigned to the committee can vary according to the needs and wishes of the organizing and sponsoring agency.

The committee could function on strictly an advisory basis, with little or no authority to implement recommendations, or act as a true steering committee with the authority to study problems, review alternative solutions, and take the necessary action. It may be desirable to have both an advisory group with broader representation and a steering committee that is empowered to meet more frequently and to implement their decisions.

The CBAE programs in Illinois, Florida, Ohio, Pennsylvania, and Arkansas have all utilized or are currently utilizing one or more planning or advisory groups.

Staffing the Program

Once a decision has been made about the type of CBAE program to be implemented, careful thought must be given to the number and type of staff needed. Staffing decisions will depend on several factors, including the type of program to be implemented, the particular design of the program, the number of trainees to be served, and the financial support available.

Most CBAE programs use some type of differentiated staffing pattern to carry out the personnel functions required. Though most of the professionals in a CBAE program will be designated as "resource persons," they will not all have the same duties, nor the same credentials. Among the major staffing functions that must be performed are the following:

- Planning individual student programs
- Helping students with the cognitive understandings required to perform the competencies
- Helping students plan and critique simulated performances

- Organizing, planning, and supervising field experiences
- Producing and evaluating supplemental program materials
- Assessing trainees' final experience demonstrations
- Coordinating the total program

The normal faculty teaching load may have to be adjusted when implementing CBAE programs. Resource persons must have the time needed to work with students individually and in small groups, as well as the time needed to make adequate field visitations and conduct final performance assessments under actual administrative conditions. In general, experience with the internship type of program indicates that one full-time resource person can effectively serve a maximum of 12-15 persons.

Southern Illinois University at Carbondale has organized their internship program around three types of persons: (1) the university professors, who carry out most of the planning and instructional functions; (2) local educational leaders, who provide daily internship supervision; and (3) the interns, who complete the theoretical studies and practical field experiences identified for proficiency development. The functions of the program leaders are as follows:

- The cooperating educational leader and institution provide interns with an average of two hours per day when they can pursue specific activities that relate to professional growth.
- The university provides an assigned resource person (professor) to offer classroom instructional sessions and coordinate the internship experiences. The instructional sessions include discussions of module readings, review of case studies, critiques of planning documents, workshops and seminars conducted by state department and private sector personnel, and simulations of administrative performances.

Temple University's LIFE (Leadership Intern Field Experience) Program also uses a differentiated staffing design. Key personnel in the LIFE program include (1) a program coordinator, (2) a field resource person (FRP) for every 12 interns, and (3) resident leadership resource persons (RLRPs). The functions of the program leaders are as follows:

- The program coordinator is responsible for (1) handling admissions, (2) reviewing students' progress, (3) assisting faculty who teach the pre-internship courses, (4) supervising and providing inservice education for the FRPs, and (5) directing leadership theory seminars.
- The FRPs are full-time university faculty who make regular visits to each of the interns to observe, to conduct helping conferences with the interns and RLRPs, and to correlate the module and theoretical classroom studies with the on-site experiences.
- The RLRPs, who are certificated local administrators of vocational education, volunteer their assistance to provide daily supervision

of the interns. They also arrange for appropriate field experiences for the interns and help the FRPs with periodic and final competency assessments.

The Florida Extern Program uses a differentiated staffing pattern that is perhaps unique because it is also a statewide program. The major personnel involved in this program include (1) a statewide extern program coordinator, (2) a vocational administrator educator from each of the six cooperating universities (referred to as ACEs), (3) selected local administrators who work with the externs (referred to as PROs), and (4) various short-term resource persons from the state agency and from business, industry, and agriculture, who lead seminars on specific competency areas. The functions of the program leaders are as follows:

- The program coordinator is responsible for planning and supervising the program, including conducting about five 3-day statewide workshops for all the externs.
- The ACEs assist with the state-level seminars but are also responsible for planning and conducting about five 1 1/2-day regional seminars, facilitating the completion of agreed-upon modules, and making on-site visitations to each extern in their region.
- The PROs and other resource persons assist with the state and regional seminars, help arrange for the appropriate field experiences, and participate in competency progress and final assessments.

Selecting Competencies

The selection of the competencies to be included in the administrator education program is an essential step that must be taken early in the program design process because it affects most other aspects of the program. Many procedures have been and continue to be used to identify the essential, critical, and/or unique competencies required for various programs.

Some states (e.g., Illinois, Florida, and Pennsylvania) have conducted their own research to identify and verify the competencies required in their own programs. Many other states (e.g., Arkansas) have either adopted the National Center's 166 competencies or conducted state-level verification studies using those competencies as a base. Most studies have resulted in the identification of competencies that correlate closely with the National Center's listing.

Another major factor to consider when identifying competencies to be required is the state's certification requirements. While most states still offer administrator certification based on university program review and approval, more and more states are requiring their universities to specify what competencies will be addressed, and their source, as part of the approval process. Other states (e.g., Arkansas and Florida) have either established specific competency certification requirements or are in the process of doing so.

For example, in April 1982, the Arkansas State Board for Vocational Education adopted certification requirements specifying that 18 of the competencies addressed by the CBAE modules must be completed before the standard "vocational administrators certificate" can be awarded. Before the more advanced "professional administrators certificate" is awarded, another 10 of the competency areas (modules) must be satisfactorily completed.

Program planners wanting to use the CBAE modules developed by the Consortium and the National Center may find the Vocational Administrator Competency Profile presented as sample 11 helpful. It lists the 29 modules that collectively address all the 166 competencies identified as important in the national research study. The modules are clustered into nine broad categories, which may be helpful where the course translation procedure is used. This type of profile chart may also be used as an aid in the needs assessment process and as part of the record-keeping procedures.

Consideration also needs to be given to determining which competencies are most critical to the beginning administrator. These key competencies should be used to make up the required core for the preservice program, with some electives being permitted to round out the program. The inservice program for CBAE will usually be highly individualized and depend on a careful assessment of the individual administrator's identified and perceived needs.

Temple University's LIFE Program uses a unique career-ladder approach to competency development. Their leadership program requires an attainment of the following numbers of competencies:

- Curriculum specialist 38 competencies
- Supervisor of vocational education 74 competencies
- Director of vocational education 134 comptencies

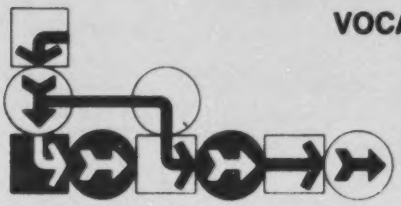
By completing the curriculum specialist option, a trainee has also acquired approximately one-half of the competencies required for the supervisor's certificate. And by completing the supervisor's competencies, the trainee has attained over one-half of the competencies required for the director's certificate.

Selecting Students

Admission to most internship programs (e.g., those at Temple University and Southern Illinois University) involves meeting the standard advanced-degree entrance requirements of the graduate school involved. Most interns work toward the requirements for a master's, educational specialist, or doctoral degree while enrolled. In addition to requiring that trainees meet the graduate school requirements, Temple University requires (1) an acceptable school site and a willing and qualified RLRP and (2) sponsorship by a local director of vocational education before trainees are admitted to the internship phase of the program.

SAMPLE 11

PROFILE CHART



VOCATIONAL ADMINISTRATOR COMPETENCY PROFILE

Name _____ Address _____

Institution _____ Date Started _____

Resource Person(s) _____

Leadership & Training (LT) Series

These 29 CBAE modules address all the 166 competencies identified in research conducted by the National Center as important to secondary and postsecondary vocational administrators. The U.S. Office of Education supported the competency identification research and the development of six modules and a user's guide. In order to continue the development of the additional materials needed, several states formed the Consortium for the Development of Professional Materials for Vocational Education. Cooperatively these states and The National Center for Research in Vocational Education developed 23 additional modules, two additional guides, and a slide/tape presentation.

CBAE

SUPPORTING MATERIALS

Guide to Vocational-Technical Education Program Alternatives: Secondary and Postsecondary—An Introduction

Guide to Using Competency-Based Vocational Education Administrator Materials

Resource Person's Guide to Implementing Competency-Based Administrator Education Concepts and Materials

An Introduction to Competency-Based Administrator Education (slide/audiotape)

Sponsored by: U.S. Office of Education and the following state departments of education: Arizona, Florida, Kansas, Illinois, Michigan, Ohio, New York, North Carolina, Pennsylvania, and Texas.

Developed by:

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THE OHIO STATE UNIVERSITY
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Published by:

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AMERICAN ASSOCIATION FOR VOCATIONAL INSTRUCTIONAL MATERIALS
Driftmier Engineering Center
University of Georgia
Athens, Georgia 30602

Category		
A	Program Planning, Development, and Evaluation (3 modules)	LT-A-1 Develop Local Plans for Vocational Education: Part I
B	Instructional Management (3 modules)	LT-B-1 Direct Curriculum Development
C	Student Services (4 modules)	LT-C-1 Manage Student Recruitment and Admissions
D	Personnel Management (4 modules)	LT-D-1 Select School Personnel
E	Professional and Staff Development (3 modules)	LT-E-1 Appraise the Personnel Development Needs of Vocational Teachers
F	School-Community Relations (4 modules)	LT-F-1 Organize and Work with a Local Vocational Education Advisory Council
G	Facilities and Equipment Management (3 modules)	LT-G-1 Provide Buildings and Equipment for Vocational Education
H	Business and Financial Management (3 modules)	LT-H-1 Prepare Vocational Education Budgets
I	Program Improvement (2 modules)	LT-I-1 Use Information Resources to Help Improve Vocational Education Programs

COMPETENCY RATING SCALE

1. Poor:	The administrator is unable to perform this skill or has only **very limited ability** to perform it.	**3. Good:**	The administrator is able to perform this skill in an **effective** manner.
2. Fair:	The administrator is unable to perform this skill in an acceptable manner but has **some ability** to perform it.	**4. Excellent:**	The administrator is able to perform this skill in a **very effective manner.**

Competencies

LT-A-2 Develop Local Plans for Vocational Education: Part II	**LT-A-3** Direct Program Evaluation	
LT-B-2 Guide the Development and Improvement of Instruction	**LT-B-3** Manage the Development of Master Schedules	
LT-C-2 Provide Systematic Guidance Services	**LT-C-3** Maintain School Discipline	**LT-C-4** Establish a Student Placement Service and Coordinate Follow-up Studies
LT-D-2 Supervise Vocational Education Personnel	**LT-D-3** Evaluate Staff Performance	**LT-D-4** Manage School Personnel Affairs
LT-E-2 Provide a Staff Development Program	**LT-E-3** Plan for Your Professional Development	
LT-F-2 Promote the Vocational Education Program	**LT-F-3** Involve the Community in Vocational Education	**LT-F-4** Cooperate with Governmental and Community Agencies
LT-G-2 Manage Vocational Buildings and Equipment	**LT-G-3** Manage the Purchase of Equipment, Supplies, and Insurance	
LT-H-2 Identify Financial Resources for Vocational Education	**LT-H-3** Develop Applications and Proposals for Funding Vocational Education	
LT-I-2 Use Inquiry Skills to Help Improve Vocational Education Programs		

In extern programs, a variety of selection approaches are utilized. Since pursuit of an advanced degree and graduate credit is usually an option rather than a requirement, the usual graduate school entrance requirements are not a factor for most externs. In most cases, the extern must apply for acceptance in the program and have the support of his/her administration and board.

The selection requirements for externs in Florida's 1981-82 program were as follows:

- Applicants must hold a regular vocational teaching certificate
- Level of training on the certificate should be master's or higher degree level
- Regular certificate should include a vocational instructional subject endorsement
- Applicant must have at least three years of full-time vocational teaching experience

The responsibility for participant selection in Florida was shared by the state department of education, the universities, and the local educational agencies. Final responsibility for approval rested with the state staff.

Providing Learning Facilities

Many of the facilities required for the operation of CBAE programs already exist in most universities and colleges of education. This is not to say that new or remodeled facilities would not be desirable; however, they are not essential. The small and large classrooms, resource person offices, individual study carrels, seminar rooms, and libraries already available in many institutions can be readily adapted for use in either intern or extern programs.

It should be remembered that the heavy emphasis on field experience in both programs reduces the need for extensive lab and classroom facilities at the university. On the other hand, it does speak of the need for a conference room, perhaps the local administrator's office, where the field resource person and/or the resident resource person can confer in private with the intern or extern.

In most cases, any additional facilities needed would have to be classified as desirable rather than essential to efficient program operation. A new or specially remodeled resource center (perhaps made out of a previous lecture hall) would certainly be desirable, however. It could house all the instructional materials needed: modules, supplementary references, films, slide/tapes, videotapes, and so on. It should have various types of media equipment, suitable viewing and listening carrels, and adequate numbers of bookcases and filing cabinets.

It should also have small work areas, study tables, and small conference and seminar rooms for use by the trainees and resource persons. A central office area should be maintained and serve as records and communications center. For sample floor plans and more information about the design, management, and use of a resource center, the reader is referred to Chapter VII of the following reference: Fardig et al., Guide to the Implementation of Performance-Based Teacher Education.

Maintaining Student Records

Persons wanting to criticize the competency-based movement will frequently argue that the record keeping required in CBAE, PBTE, and CBE is extensive and completely unmanageable. Opponents may even argue that a computerized record system is absolutely essential. Nothing could be further from the truth, as evidenced by the many CBAE extern and intern programs operating successfully in many states without the use of any computerized system. It is true that, because the learning activities and procedures in CBAE are quite different (and for good reasons), new types of record-keeping systems are needed to keep students, resource persons, and others informed.

These differences can create not only philosophical arguments among administrator educators, but consternation and misunderstanding in registrars' offices. Registrars find it very difficult to accept the idea that all or even most of the students in a CBAE program could receive a grade of A. Registrars also quickly discover that their present record-keeping systems are not able to process large numbers of grades on individual competencies, nor are they able to provide frequent readouts of student progress. The coordinator of a new CBAE program may have to spend time working with the registrar and other college administrators in devising ways to accommodate the requirements of the new program to old record-keeping procedures.

If the CBAE program retains the conventional structure by translating courses into competencies and substituting CBAE modules for the previous units, there will probably be little need to change the reporting system. Course grades can be computed in the usual way, on the basis of the module learning activities that the students have completed. Even this limited application of the CBAE concepts and materials can greatly enhance the objectivity of grading. In a more fully developed CBAE program, there are a number of questions that must eventually be answered if an efficient and helpful record-keeping system is to be devised, for example:

- How will the students' initial needs assessment be conducted and recorded?
- How will each student's personal/professional development plan be devised and recorded?
- How will each student's achievement of each competency be recorded and reported?
- What kind of final record or transcript should be produced?

Assessing Student Needs and Developing Individual Plans

Every CBAE extern and intern program has devised some type of appropriate needs assessment process for the beginning trainee, whether he/she is a preservice or an inservice administrator. This step is obviously an essential one if the CBAE program is going to be truly individualized according to the needs of the participants. While the procedures used vary somewhat from program to program, they all focus on determining which competencies the trainees already have obtained and which will need to be acquired through the program.

In the Florida extern program, considerable time is spent on identifying three types of competencies that the externs will pursue. Prior to or during the first statewide workshop, all the externs are asked to complete both a Vocational Administrator Competencies Checklist and a General School Administrators Competencies Checklist. These data are used to establish (1) the competencies, needed by all externs, that will be addressed at the state-level meetings, (2) the competencies needed that will be addressed at regional meetings, and (3) the competencies to be pursued individually by each extern.

Based on the identified needs, and in consultation with the regional resource person, an individual program is prescribed for each extern. The extern and resource person(s) decide on the total number of CBAE modules needed, as well as the sequence and pace at which the extern can best accomplish the required competencies. For an illustration of the Florida Extern Training Plan, see sample 12.

Upon entering Temple University's LIFE Program, each intern completes a needs assessment instrument that lists the 134 competencies expected of their vocational directors. In addition, the intern's present or former supervisors rate his/her competency level using an identical instrument. The FRP then compares the rating on these instruments, resolves discrepancies, and determines the needs of the intern. A notebook of 134 performance assessment instruments--one for each of the required competencies that were developed by a Pennsylvania Consortium--is also given to the student at the beginning of the internship. These instruments guide the intern, as well as the resource persons helping the intern, during competency development.

The next step is to develop "prescriptive plans" for how the intern will attain the identified competencies. In the prescription process, the particular activities, completion schedule, and the persons to be involved are identified. The input of the RLRP is sought to make the competency development experience most beneficial for the intern. The FRP coordinates this effort and also provides input concerning the most appropriate modules to use to acquire the theory supporting each of the competencies.

Southern Illinois University at Carbondale uses a specially designed portfolio as their major document for both pre- and postassessment. The portfolio consists of a series of task statements for each of the 159 competencies required in their program. For each of the performances, a pre- and postassessment rating is given by the intern concerning his/her level

SAMPLE 12

EXTERN TRAINING PLAN

___ Inservice
___ Preservice
___ Graduate Credit

FLORIDA PERSERVICE/INSERVICE
EXTERN LEADERSHIP TRAINING
PROGRAM FOR ADMINISTRATORS OF
VOCATIONAL EDUCATION PROGRAMS

Name _____
Region _____
Target Date for Program Completion

COMPETENCIES	RESOURCES NEEDED	DATE STARTED	DATE COMPLETED	CRITERIA AND/OR PRODUCTS	LEVEL OF PERFORMANCE			
					Excellent	Good	Fair	Poor
1. Statewide Group Needs/Competencies								
2. Regional Group Needs/Competencies								
3. Individual Needs/Competencies								

Signature, Extern _____ Date _____

Signature, Sponsoring Administrator _____ Date _____

Signature, Vocational Teacher Educator _____ Date _____

RATING OF MASTERY OF COMPETENCIES

5 EXCELLENT - Performs in very effective manner.
4 GOOD - Performs in a satisfactory manner.
3 FAIR - Performs marginally, needs some improvement.
2 POOR - Performs the skill but needs a great deal of improvement.

GOOD is the lowest performance level acceptable in this program.

NOTE: This form has been reduced in size to save space

of cognitive proficiency development: (1) none, (2) knowledge, (3) comprehension, (4) application, (5) analysis, (6) synthesis, or (7) evaluation.

The dates of both assessments, as well as the methods of attainment, are entered into the record. Signature by the cooperating administrator and university coordinator indicate their concurrence with the marked level of proficiency. For purposes of this program, acceptable competence is defined as follows: Having obtained at least the comprehension level of cognitive proficiency and the receiving level of affective proficiency on 90 percent of the performances. Sample 13 shows a typical portfolio rating form.

SAMPLE 13

PORTFOLIO RATING FORM

1. **Prepare a short-range and a long-range program plan for vocational education in the school.**

Actual Conditions: _____

_____

_____

Actual Performance: _____

_____

_____

Preassessment: Cognitive _____ Affective _____
Certification _____ Mode _____

Postassessment: Cognitive _____ Affective _____
Date Achieved _____ Certification _____
Mode _____ Importance 1 2 3 4
None Very

According to the Carbondale program staff, the portfolio serves as a blueprint for progress throughout the leadership development program. The portfolio clearly outlines the performances expected of the intern at the beginning of the program, and their accomplishment becomes the intern's basic responsibility. To achieve a necessary competency, the intern can pursue a wide variety of options for competency development, including designing his/her own learning activities. The university coordinator periodically reviews the postassessment ratings to determine the intern's progress and areas in which the intern may be in need of extra help.

Reporting Student Progress

While the Illinois portfolio and the Pennsylvania performance assessment instrument package are used as part of the progress reporting systems for those programs, a number of other techniques are also being used. To assessthe attainment of individual competencies, for example, Florida, Arkansas, Ohio, and many others use the Administrator Performance Assessment Form (APAF) contained in the back of each of the CBAE modules (see Appendix D, p. 91).

Each APAF contains a list of approximately 15-30 specific critera that can be used to quickly and fairly objectively evaluate an administrator's demonstration of competence. The APAF is the definitive document for each competency addressed by the CBAE modules and indicates the level of effectiveness that can be expected from the administrator in future professional roles. In the newest version of the modules, the APAF can be easily removed and filed as a part of the student's official record of achievement.

Other types of competency record forms are commonly used to monitor overall progress toward completion of the required competencies. The Vocational Administrator Competency Profile (see sample 11, p. 56) may be used for this purpose. The LIFE Program at Temple University uses a progress record form that provides space for recording the beginning and ending dates for "theory" acquisition and for rating the level of "application" obtained. See sample 14 for an illustration of this form.

Some institutions and programs use an individual professional development plan as the basis for recording overall progress. See sample 9, p. 47, for a copy of the instrument used in the Arkansas Extern Program. In the Florida Extern Program, mastery of competencies by a participant is checked off on the Extern Training Plan (see sample 12, p. 61), which is generated from information gathered during the needs assessment and individual planning phases.

Grading Students

Given the concepts of competency-based education and criterion-referenced assessment, traditional letter grades are totally inappropriate. As a student completes the required set of modules containing the important competencies, he/she either satisfactorily demonstrates the competency or recycles through some of the learning experiences until successful performance is achieved. Students are not compared with one another; their ability is assessed in terms of predetermined criteria. Grades are awarded only when students have demonstrated that their ability to perform meets the established standards. A reporting system using criterion-referenced principles in a true CBAE setting would identify only the competencies the student has successfully demonstrated.

During the transition to CBAE, the problem of grading can be bothersome and difficult to reconcile. Grading systems tend to become institutionalized and strongly resistant to change. It is common, therefore, for a new CBAE

SAMPLE 14

LEADERSHIP INTERN'S PROGRESS RECORD

Competencies of the Vocational Education Director

	Theory				Application			
	**Mod. No.	Begin Date	End Date	Competency	Level Reg.	Attain	FRP Sign.	Completion Date
				Management of Business and Finance				
*1.	___	___	___	Prepare an annual budget for vocational education.	3	___	___	___
2.	___	___	___	Prepare a capital improvement budget for a vocational facility expansion or construction.	3	___	___	___
*3.	___	___	___	Locate potential sources of funding for new and continuing vocational program operation and development	3	___	___	___
*4.	___	___	___	Administer annual vocational education budget in line with approved policies and priorities.	3	___	___	___
5.	___	___	___	Implement procedures for purchasing, receiving, dispensing, and accounting for educational supplies, equipment, and services.	3	___	___	___
6.	___	___	___	Maintain an approved accounting system providing control, analysis, and audit for all vocational education program funds.	3	___	___	___
*7.	___	___	___	Analyze the cost of operating a vocational instructional program.	3	___	___	___
8.	___	___	___	Maintain insurance coverage for the vocational education program.	3	___	___	___

Levels: 1-Awareness 2-Understanding 3-Guided Application 4-Independent Application 5-Mastery
*Key Competencies
**Or equivalent course

SOURCE: Developed and used by Temple University's LIFE Program

program to have to operate within the confines of the existing grading system. Here are some of the options that should be considered:

- Use of Satisfactory (S) and Unsatisfactory (U) grades for evaluating performance. Given flexible time, all students should be able to obtain S ratings on all competencies.
- An Incomplete or In-progress grade (I) can be used, in addition to S/U grades, to indicate the learner is still working on a module or set of competencies but has not yet attained the necessary competence.
- Students may be permitted to work on a series of modules for a given course or independent study program without actually registering for the course until the required competencies have been achieved. The registration and awarding of credit would then take place simultaneously.

Awarding traditional letter grades (A-F), as required in many educational institutions, requires some additional planning. If the resource person is satisfied that a student has demonstrated competence, an A should be awarded. However, some administrators and most registrars find it difficult to accept that all students could potentially receive straight-A records. Hence, it may be necessary to award both A and B grades as follows:

- Award B grades to the trainees who obtain "good" and "excellent" ratings on all the module APAF criteria.
- Award A grades to the trainees who receive "excellent" ratings on all the module APAF criteria.
- Use I for students whose work is incomplete.

Awarding Course Credits

In an ideal model of CBAE, the main consideration in preparing administrators for their professional role would be that of requiring them to demonstrate the important competencies. Awarding credits toward a college degree would have little importance in such a model. This explains why participants in extern-type programs often opt to forgo the available graduate credit. The realities of higher education and the requirements for certification, however, often require participants to seek credit for their study. The following are some of the strategies being used to decide how much and when credit should be awarded:

- Assign each module a credit-hour value. Since all modules are not equally demanding, the value should vary with the estimated difficulty or time required for completion. The median time required for completion of the CBAE modules during field testing ranged from 2-12 hours. Data on the range and median hours required were collected on all modules during field testing (see sample 15).

SAMPLE 15

TIME ESTIMATES FOR COMPLETION OF THE CBAE MODULES

	Title	Range (in Hours)	Median (Hours)
CATEGORY A: PROGRAM PLANNING, DEVELOPMENT, AND EVALUATION			
LT-A-1	Develop Local Plans for Vocational Education: Part I	2.0-10	4
LT-A-2	Develop Local Plans for Vocational Education: Part II	1.0-15	4
LT-A-3	Direct Program Evaluation	1.0-20	4
CATEGORY B: INSTRUCTIONAL MANAGEMENT			
LT-B-1	Direct Curriculum Development	1.0-16	3
LT-B-2	Guide the Development and Improvement of Instruction	1.0-13	4
LT-B-3	Manage the Development of Master Schedules	0.5- 5	2
CATEGORY C: STUDENT SERVICES			
LT-C-1	Manage Student Recruitment and Admissions	1.0- 5	3
LT-C-2	Provide Systematic Guidance Services	1.0-35	5
LT-C-3	Maintain School Discipline	2.0-40	5
LT-C-4	Establish a Student Placement Service and Coordinate Follow-up Studies	2.0-20	8
CATEGORY D: PERSONNEL MANAGEMENT			
LT-D-1	Select School Personnel	3.0-25	5
LT-D-2	Supervise Vocational Education Personnel	2.0-30	8
LT-D-3	Evaluate Staff Performance	3.0-25	9
LT-D-4	Manage School Personnel Affairs	1.5-60	7
CATEGORY E: PROFESSIONAL AND STAFF DEVELOPMENT			
LT-E-1	Appraise the Personnel Development Needs of Vocational Teachers	3.0-30	8
LT-E-2	Provide a Staff Development Program	2.0-25	4
LT-E-3	Plan for Your Professional Development	1.0-48	5
CATEGORY F: SCHOOL-COMMUNITY RELATIONS			
LT-F-1	Organize and Work with a Local Vocational Education Advisory Council	1.0-25	5
LT-F-2	Promote the Vocational Education Program	1.5-24	4
LT-F-3	Involve the Community in Vocational Education	2.0- 8	2.5
LT-F-4	Cooperate with Governmental and Community Agencies	2.0-50	9
CATEGORY G: FACILITIES AND EQUIPMENT MANAGEMENT			
LT-G-1	Provide Buildings and Equipment for Vocational Education	2.0-60	4
LT-G-2	Manage Vocational Buildings and Equipment	3.0-20	10
LT-G-3	Manage the Purchase of Equipment, Supplies, and Insurance	1.0-30	5
CATEGORY H: BUSINESS AND FINANCIAL MANAGEMENT			
LT-H-1	Prepare Vocational Education Budgets	1.5-25	10
LT-H-2	Identify Financial Resources for Vocational Education	0.5- 8	4
LT-H-3	Develop Applications and Proposals for Funding Vocational Education	4.5-30	12
CATEGORY I: PROGRAM IMPROVEMENT			
LT-I-1	Use Information Resources to Help Improve Vocational Education Programs	1.0-24	4
LT-I-2	Use Inquiry Skills to Help Improve Vocational Education Programs	1.5-16	6

- Identify a group of modules, perhaps three or four, to substitute for the content addressed in a traditional course. Successful completion of the modules would be equal to satisfactory work in the course.
- Set up the field experience to include a group of "courses" taken simultaneously, and translate the courses into a specified number of modules to be completed for a given amount of credit.
- Have students contract to complete a specified number of modules per quarter or semester or during the internship or externship period. When the entire required set of competencies is attained, award a predetermined number of credits toward certification and/or a degree.

Each institution will have to make its own decision about requirements, records to be kept, grades to be given, and credits to be awarded. These decisions, whatever they are, should be defensible and made clear to the students, resource persons, and administrators who are directly involved or concerned. As many decisions as possible should be made before implementation, with the counsel of an advisory or steering committee. These decisions, as well as the corresponding records and procedures to be used, should be thoroughly explained to everyone who will be affected by them.

Coordinating the Multiagency CBAE Effort

In order to develop a successful CBAE program, the close cooperation of several educational agencies is required. In a field-centered and individualized extern-or intern-type program, secondary schools, postsecondary institutions, universities, and the state agency have unparalleled opportunities to cooperate for the preparation of administrators and the improvement of education. In contrast to course-based and campus-oriented programs in which the university almost totally controls and operates the program, in CBAE programs the schools, colleges, and the state agency become essential components of the same operation.

There is great need, therefore, to plan for and coordinate the CBAE program carefully with all the parties involved. The educational institutions in which the field experiences must take place need to be selected carefully, using criteria that will assure the best possible environments for those experiences. Highly skilled administrators from those institutions must also be selected and trained to serve as on-site resource persons. Other resource persons from the cooperating universities, the state education department, professional associations, and business and industry will also need to be identified and oriented to their jobs of addressing the competency areas for which they are most qualified.

While the cooperation and coordination required in a CBAE program present an obvious challenge, they also provide a unique opportunity to create a training environment that is realistic and maximally conducive to professional growth for the administrator trainees. Since it is these trainees that will heavily influence the vocational and technical education programs of the future, we can ill afford to do anything other than provide the best preparation conceivable.

There is plenty of room for misunderstanding and potential conflict in a CBAE program. However, most (if not all) problems can be avoided through careful planning, consultation, and orientation of the persons involved to their roles. It must be remembered that the primary responsibility of secondary and postsecondary schools is to provide an education for each of their students. Working to help prepare future administrative leaders as well provides an added responsibility that may or may not be welcomed. Many will welcome the challenge and view their association with an intern or extern program with pride and as a way of further improving their own educational programs. However, it will behoove the CBAE program leaders to realize that there is potential for serious conflict between the dual responsibilities being asked of the schools.

In a similar manner, conflict may arise among university personnel who are being asked to relinquish some of their traditional autonomy and reponsibilities to the public secondary and postsecondary schools. The university resource persons cannot tell the on-site cooperating administrator how the field experience is to be conducted. Instead, they need to explain the kinds of experiences desired and cooperatively plan with him/her to arrange for the best learning situation possible. As long as all parties trust one another and realize the important contributions that each party can make, any problems should be minimized.

Mention also needs to be made of the very important role of personnel from the state educational agency. Persons from this agency should be intimately involved in the planning and conducting of a CBAE program. Not only will moral and financial support be needed, but the active participation and support of state-level program administrators, supervisors, and consultants are essential. The administrator trainees must understand the state agency's role and become acquainted with key agency personnel and their various job functions. A CBAE program provides an excellent opportunity to bring about the cooperation and relationships needed.

The program staff at Southern Illinois University at Carbondale feel that the state agency office is so important to the operation of occupational programs statewide and in terms of the services available to schools that it is a requirement that each intern spend some time there. The organizational chart personnel roster "comes to life as the intern connects personalities with programs and services."

Selecting Cooperating Educational Institutions

Experienced CBAE program coordinators stress that the selection of cooperating secondary and postsecondary institutions needs to be very carefully done. The importance of the field-experience component to the total program makes this process critical to the successful operation of the CBAE program. The CBAE coordinator will want to seek nominations from several sources and obtain the approval of the state agency before making selections. It will

also be helpful to establish a clear set of selection criteria. Some suggested criteria are as follows:

- The institution offers a comprehensive and high-quality vocational or technical education program.
- The chief administrator at the institution understands the expectations and implications of becoming a cooperating institution and fully supports that involvement.
- The chief administrator is willing to serve as the on-site cooperating administrator (resource person) or to designate another qualified administrator to do so.
- The cooperating administrator is willing to commit him/herself to helping develop and implement a personal program of field experiences that will help the intern/extern acquire the competencies needed.
- The necessary facilities will be available (e.g., office space and meeting rooms) for use of the trainee and resource person.
- The chief administrator is willing to sign a Memorandum of Agreement or some similar written document outlining the institution's willingness to cooperate fully.

A copy of the Competency-Based Intern Program Agreement used by Temple University is presented as sample 16. In preparing a like agreement, the CBAE program coordinator should work cooperatively with university personnel, personnel at the cooperating institution, and state educational agency staff to develop clear statements of resonsibility that all can agree to and support. While each situation is somewhat different, the list shown in sample 17 suggests some appropriate responsibilities for each of the major agencies involved in CBAE.

Financing the Program

Whenever a new or considerably different type of educational program is proposed, several questions quickly arise concerning its costs. How much will CBAE cost? Will it cost more than our current program? Where can we get the money? Will the additional benefits be worth the possible additional costs? These are some of the questions that must be addressed as one seriously considers the implementation of some type of CBAE program.

The financial requirements of any program will vary depending on the size of the program, whether the concern is with developmental or operational costs, and the specific characteristics of the program. It is important that each institution considering a CBAE program look at the probable costs and benefits of different program features and designs. Some of the most helpful information about the cost of operating various intern- and extern-type programs can be obtained from persons and institutions already operating the type of program of interest (see Appendix E for a description of selected CBAE programs and the names of their coordinators).

SAMPLE 16

COMPETENCY-BASED INTERN PROGRAM AGREEMENT

TEMPLE UNIVERSITY
College of Education
Department of Vocational Education

It is the intent of this agreement to provide an operational interface among cooperating on-site supervisors, program interns, and Temple University. Since certification of vocational directors and supervisors is currently based on competency attainment, rather than credit hours, it is extremely important for those involved in this innovative program to have their responsibilities specifically delineated.

A Cooperating On-site Supervisor shall be responsible for the daily supervision of interns and cooperate with representatives of Temple University in planning and implementing an effective competency based educational program for each intern.

An intern shall work under the direction of a cooperating on-site supervisor toward the specified level of competency in each defined area in which he or she is judged to be deficient in terms of meeting state certification requirements.

An Instructional Representative (Field Resource Person) from the Department of Vocational Education, Temple University shall work cooperatively with the on-site supervisor and each intern in planning prescriptive activities designed to provide each intern with a degree of competency judged appropriate for the certification level to which the intern is aspiring. The number of semesters required to obtain the appropriate level of competency shall not be less than one and will obviously vary based upon the needs of each individual intern.

Cooperating On-site Supervisor	Institution
Intern	Program Director
Field Resource Person	

SAMPLE 17

RESPONSIBILITIES OF MAJOR AGENCIES

University Responsibilities:

- Develop CBAE program design
- Provide training for field resource persons
- Help select cooperating educational institutions
- Identify appropriate CBAE modules
- Provide access to supplemental media and references
- Provide university-based resource persons
- Provide CBAE orientation to students and resource persons
- Help arrange for appropriate field experiences
- Develop and maintain a record-keeping system
- Maintain close coordination with cooperating institutions and state agency
- Evaluate CBAE program components

Cooperating Institution Responsibilities:

- Provide qualified on-site resource persons
- Provide the field experiences needed by trainees
- Provide necessary facilities and equipment
- Cooperate with university personnel in program supervision
- Maintain records of student field experiences

State Education Agency Responsibilities:

- Provide financial support to the universities and/or cooperating institutions
- Provide administrative assistance and support
- Provide resource persons to address the trainees
- Maintain liaison with all participating cooperating institutions and universities
- Provide certification for persons who successfully complete the program
- Monitor program activities and participate in its evaluation

Ultimately, the decision to implement a CBAE program will probably depend to a large extent on its cost. State-level and university administrators are usually aware of the various costs commonly associated with new and innovative programs and may be unable to support a proposed program, especially if the long-term operational costs are going to be much higher per person than the existing program. There are a number of characteristics of CBAE programs that influence their costs. Among these factors are the following:

- Instructional materials and methods are more individualized. Now that high-quality individualized instructional materials have been developed, trainees can purchase these materials much as they do traditional course textbooks. Generally, the cost to the trainee would be comparable.
- The frequent one-to-one contacts between resource person and trainee required may involve a higher cost factor than that of using university faculty or workshop personnel to deal primarily with large groups of persons.
- Travel costs involved in arranging for field experiences and makng field visits will need to be covered.
- Lodging and travel costs for persons in extern programs attending workshops and weekend seminars will need to be covered by the participants or some agency.
- The assessment of trainee competencies (in the actual administrative situation) will consume a greater amount of a resource person's time and energy than does grading in conventional courses. This extra time will be offset considerably, however, by the lesser amount of time required for lectures, lesson preparations, and the grading of tests.
- The cost of developing and maintaining a resource center, with its equipment and related resources, can add to both developmental and operational costs.
- Initially, administrator educators and field supervisors who will be serving as resource persons will need to be given training in their new roles and responsibilities.
- Other program development costs may be incurred initially in developing the program design, devising a management and record-keeping system, and assembling needed instructional materials.

It should be remembered that many of the developmental costs will not continue. Programs using the CBAE modules described earlier in the guide will not have to pay for the substantial cost of developing high-quality instructional materials because the U.S. Office of Education and ten state departments of education committed to CBAE have already paid for them. In addition, new institutions wanting to implement some type of CBAE program can benefit from the experience and technical assistance available from the National Center and institutions that have already successfully implemented programs.

It is perhaps worthy of note here that all the intern and extern programs described in Appendix E have received or continue to receive financial support each year from their respective state agency for the development and/or operation of their leadership training programs. Some funding has been on a project basis (e.g., to identify competencies, develop assessment instruments, or produce instructional materials), while other funds have been allocated for travel and instructional staff time.

The state agencies have not been the only source of funds, however. The universities contribute toward meeting operational costs, the interns usually pay tuition costs, and the institutions sponsoring externs frequently support their candidates through released time and provision of some of the travel costs.

All options for funding the CBAE program should be explored. Several alternative procedures worthy of consideration are as follows:

- The university may require more credit hours for degree candidates enrolled in the CBAE program, thus increasing tuition yield.
- The CBAE program director might get additional funding support from the university for the field-based component of the program.
- The CBAE program may seek outside funding in the form of grants.
- Local school systems might contribute additional funds for the field-based component and inservice CBAE programs.
- State divisions of vocational education may contribute to the CBAE program through the allocation of funds from the inservice professional development budget.

While some of these alternatives may be impossible or undesirable, every effort should be made (1) to justify the need for additional funds (when the need is real) and (2) to secure the resources needed. In most cases, a collaborative effort on the part of the universities, the cooperating educational institutions, the state educational agency, and the trainees themselves will be called for. Funding in most cases will be possible--as several implementing institutions and states have already demonstrated--when the need exists and educators see the benefits to be achieved.

Regardless of whether CBAE programs cost more or less than traditional programs, we must look at the long-range cost-effectiveness of preparing administrators through CBAE approaches. Most of all, attention must be given to the effect their preparation and resulting leadership have on their teachers and other staff, who in turn greatly influence the quality of the vocational and technical programs offered to students.

Evaluating the Program

CBAE programs should be evaluated for at least three very good reasons. First, the concepts of CBAE require it--if they are to be implemented to the

fullest extent. Second, the program should be evaluated for the purposes of collecting data for program-improvement purposes. Third, the sponsors and the concerned publics have a right to know whether the program is meeting its established objectives. In fact, without such evaluation data, the program could lose its funding support and cease to operate.

Because the need to evaluate educational programs is widely accepted and recommended procedures are fairly well known, little needs to be said of the process here. It goes without saying that both formative and summative types of evaluation should occur.

Evaluation of a formative nature--conducted while a new program is being designed and implemented--can provide valuable decision-making data for reshaping the program while it is in operation. Formative data (e.g., reactions from all participants, data on the progress participants are making toward achieving competencies, and feedback regarding specific learning activities) can be immediately put to use to make "in-course corrections" or modifications that will improve the overall program while it is in progress.

At the conclusion of one or more years of program operation, summative data should be gathered to determine how well the program met the established objectives. This could include (1) follow-up data gathered from the participants to determine their satisfaction with the program, (2) the type of position they currently hold, and (3) their recommendations for continuing or discontinuing the program. The institutions offering the CBAE program can use these data to decide whether the program should be continued, discontinued, or modified in certain ways. These data can also be extremely useful in convincing sponsors that they should continue to support the program. Potential trainees should also be keenly interested in the reactions of the program's prior participants.

Each of the programs described in Appendix E has reported evaluation results concerning their efforts. Project LIFE reports that, while their evaluation is informal in nature, activities consisted of two parts: (1) semi-annual evaluations of the total system and (2) continual evaluation of the subsystems. Continual input for evaluation is obtained from (1) the interns' weekly activities analysis reports, (2) site visitation reports, (3) site-supervisors' reports of intern progress, and (4) mid-term intern reports.

Illinois institutions have conducted several evaluations of their CBAE efforts over the past ten years. Perhaps most notable was a follow-up survey of over 100 participants conducted in 1978 and a survey of over 50 participants' employers conducted in 1979. The researchers concluded that the impact of CBAE programs at three Illinois universities has been "substantial and positive as far as participants and employers are concerned."

Florida and Ohio have also collected formative and summative data on their programs. Such data have been used for program improvement, as well as for expenditure justification purposes. It might well be said that, in a CBAE program, you cannot afford to fail to evaluate either the processes used or outcomes attained.

Chapter VI

IMPLEMENTATION OF CBAE

Once you have made the decision to make CBAE part of your vocational administrator education program, you may feel overwhelmed by the work involved in putting CBAE in place. Where do you start? Think of the implementation process as having three basic steps: (1) gathering information, (2) making and following a plan, and (3) checking, or evaluating, your efforts. The following describes one basic framework you can use to help you get started. It is not the only approach to implementation of CBAE, but it does contain the basic elements needed to get the job done.

As mentioned previously, it is usually impossible to formulate complete plans or to solve all installation problems before administrator trainees are enrolled. A more practical approach is to make basic decisions, devise the best plan possible, and then begin the program. Program revisions and adjustments can and should be made as the program and its staff gain experience.

As you begin to gather information for decision making, you need some structure or guide to follow to help you keep information organized in some logical fashion. Sample 4, p. 34, presents one system of organizing information.

One of the best ways to pull together all of the ideas and intentions about implementing CBAE is to write a narrative plan. You can then share this plan with others who have a stake in the vocational administrator education program. Sample 18 is an outline of topics that you might use in developing your implementation plan. To further develop your plan, you should also include a list of the major steps/actions to be taken, who will be responsible, and a proposed beginning and ending date for each activity.

After you have developed a narrative plan and tried to anticipate and adjust for changes in your organization, your plan needs to be checked for comprehensiveness and completeness. Once drafted, the plan should be submitted to your advisory or steering committee and/or to appropriate other colleagues for a critical review. You may want to suggest that the factors addressed in CBAE Program Considerations (sample 3, p. 33) be used as criteria for their review.

If you haven't already used external consultants in your planning process, you should consider employing them at this time to review your plans and make suggestions for improving them. A person with several years of experience in managing an externship or internship type of leadership development program can be extremely helpful in recommending tested solutions to potential problems.

SAMPLE 18

NARRATIVE IMPLEMENTATION PLAN
TOPICS TO BE ADDRESSED

Present Situation: Briefly outline the current status of CBAE implementation efforts at your institution, for example:

- What specifc position has the administration taken in regard to CBAE?
- What, if any, programs are already totally or partially competency-based?
- What CBAE activities, if any, have been planned or conducted?

Desired Situation: Indicate any specific goals or objectives for the improvement of instruction that have already been established.

- Are funding and staff available to facilitate change?
- Are there any known constraints or concerns that may impede change? If so, what are they?

CBAE Program Components: Briefly address each of the following CBAE program components in terms of their application to your institution's implementation goals.

1. Essential Elements and Desirable Characteristics: Review the five essential elements of CBAE and the associated desirable characteristics.
   - Can your institution accept each of these features?
   - What, if any, features would have to be deleted or modified for your institution? Why? What implications does this have for the quality of you program?
2. CBAE Instructional Materials/Media: Indicate how materials will be provided in your institution.
   - Will materials be developed or purchased or both?
   - Will a common materials' format be recommended?
   - What major criteria will be used in judging the quality of materials?
   - If materials are to be developed, how will the production of materials be organized? Who will develop the materials? How will their work be supported (training, funds, time)? How will the materials be produced, reproduced, and paid for?
   - If materials are to be purchased, how will outside sources be identified? How will materials be evaluated and selected? Will these materials be used as is? How will the purchase costs be covered?
3. Resource Person/Trainee Role Orientation: Describe how the resource persons and students in your institution will be oriented to their new roles.
   - How can the cooperation of these persons best be obtained?
   - What orientation activities will be conducted?
   - What orientation materials will be used? How will they be developed/obtained?
4. Assessment Procedures: Briefly describe the appropriate CBAE evaluation instruments and grading procedures to be used in your institution.
   - What types and levels of assessment are needed?
   - What types of instruments will be used? Will they be developed in-house or obtained from outside resources? What sources?
   - What assessment procedures will be used?
   - What performance standards will be set?

- What are the roles of the resource person, trainee, and administrator in assessment?
- How will grades for completed modules and for courses be determined?

5. Instructional Model: Briefly describe the ideal CBAE instructional model for your institution.

   - What procedures will be followed when a trainee enters the program?
   - How will trainees' present competency level be evaluated and validated?
   - How will individual trainee programs be designed?
   - How will trainee/resource person contact time be organized?
   - What other special instructional features will be emphasized in your CBAE program?

6. Management and Administration: Describe any specific management and administrative options that would be appropriate for your institution's CBAE program.

   - What, if any, additional (or reorganized) facilities will be required?
   - What, if any, additional instructional or media equipment will be needed?
   - Will CBAE resource centers be provided?
   - How will resource centers be managed and staffed?
   - What are the priorities among the needed resources?
   - How will instructional materials be stored, maintained, and dispensed?
   - What institutional policies need to be changed to accommodate CBAE?
   - How will registration, tuition, and program completion procedures be arranged? Will the program be open-entry/open-exit?
   - How will occupational licensure requirements be affected by a time-free program?
   - How will teaching loads and other resource person responsibilities be modified to meet the needs of CBAE?
   - What new staffing requirements will there be? What staff duties need to be changed?

7. Initiating CBAE: Indicate here any specific staff development or technical assistance activities believed to be needed to facilitate your institution's CBAE implementation goals. Consider all groups (e.g., administrators, faculty, community members) and all aspects of the program (e.g., materials development/adaptation, administrative changes, record keeping).

Specific Actions/Dates: As best as you can at this point, outline (using a form such as the one shown below) the major steps/actions that need to be accomplished to implement your proposed CBAE program. Beside each step/action, indicate who (by name or job title) will (or should be) responsible for the activity, and a proposed beginning and ending date for each activity.

Steps/Actions to be Taken	Person(s) Responsible	Begin Date	End Date

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APPENDIX A

COMPETENCY-BASED ADMINISTRATOR EDUCATION CONCEPTS

Underlying any successful educational program are one or more theories or principles of learning. Such is the case with competency-based administrator education (CBAE), which combines a number of long-accepted principles and practices of good learning. In fact, CBAE programs have been designed to maximize learning effectiveness by employing several learning principles, such as individualization, self-pacing, reinforcement, and active participation, in a synergistic combination.

Essential Elements

A review of the five essential elements of CBE as they apply to CBAE for vocational administrators will serve to clarify and illustrate the major concepts and principles behind CBAE.

The competencies to be achieved by vocational administrators are carefully identified, verified, and made known to all concerned audiences in advance of training. This simply means that all the competencies (tasks or skills) important to success as a vocational administrator must be (1) identified in an appropriate manner, (2) verified by experts who know what is currently required of administrators, and then (3) made known to the students (administrator trainees) and anyone else interested in what the program is designed to teach.

It means that the competencies are explicitly stated and later transformed into clear performance objectives that indicate exactly what the learner is expected to be able to do upon completion of the training programs. It involves motivating the students by helping them understand what they need to learn and why they need to learn it. Since experts from the field of administration are involved in the identification and verification process, there is usually little doubt about the relevancy and importance of the competencies to be achieved.

This approach may be contrasted with many courses in which the learning outcomes have been only vaguely described in paragraphs contained in the college catalog--descriptions of the general goals or objectives being sought. Most students are better motivated and more successful as learners when they know, in fairly explicit terms, what is required and expected of them.

The criteria for assessing vocational administrator competency achievement and the conditions under which achievement will be assessed are explicitly stated and made known in advance of instruction. This essential element eliminates the guessing games so often played about what parts of the course are important. Instead, the administrator trainees are told, in advance, exactly how their performance will be evaluated.

It also means eliminating the traditional norm-referenced approach to the evaluation of student achievement, where the focus is on comparing one student's progress with that of others in the same course. Instead, the criterion-referenced approach to assessment is used, where each individual trainee's progress is compared with previously established criteria that are made known to all who are involved.

The criteria are stated in observable performance terms that reflect valid and reliable measures of performance. They are usually presented in checklist form and permit a reasonably objective determination of competency level. Whenever possible, the final assessment of performance takes place while the trainee is performing in an actual administrative situation.

The vocational administrator education program provides for the individual development and evaluation of each of the specified competencies. In other words, each trainee is given the opportunity to develop each of the competencies important to his or her career objective. Furthermore, each trainee is given the opportunity to demonstrate his/her attainment of each critical competency.

The clear implication here is that the traditional 70 percent achievement score is unacceptable as a passing grade. If the competency is important, it needs to be studied and practiced until satisfactory performance can be demonstrated. This essential element has strong implications for the need to individualize CBAE programs to the maximum extent

possible and for the type of instructional materials needed to make the individualization of leadership training programs possible.

Assessment of competency takes the administrator trainees' knowledge and attitudes into account but requires actual performance of the competency as the primary evidence of ability. CBAE goes beyond the traditional educational expectation that students should know about the theories and processes of administration and places a strong emphasis on the ability to perform actual administrative tasks as well. Of course, in order to perform tasks correctly and under varying circumstances, the trainees must acquire the prerequisite knowledge and attitudes. Acquiring the prerequisite knowledge and attitudes involved, however, does not by itself ensure the student's actual ability to perform important administrative tasks.

It is with regard to this essential element of CBE that many programs fall short; they rely primarily upon paper-and-pencil tests of knowledge as proof of competency. Recalling or recognizing certain facts or theories does not require the same level of comprehension that synthesizing and applying those facts to different real-life situations require. And while cognitive measures can be appropriately used to assess prerequisite knowledge, they must be accompanied by performance-oriented, process-and-product checklists or by other measurement devices that permit the evaluator to determine the administrator trainee's actual ability to perform the expected competencies.

Vocational administrator trainees progress through the program at their own rate by demonstrating the attainment of specified competencies. Said in another way, CBAE makes time the variable and learning the constant. Once the competencies important to the success of vocational administrators have been clearly established, the trainees should be provided with the time and instructional assistance needed to achieve them. This essential element acknowledges the long-accepted learning principles that people learn at different rates and have different learning styles. It also requires that more small-group and individualized instruction should be provided. There is no justification for requiring everyone to spend the same "mythical average" amount of time on every learning task.

On the other hand, while each trainee's progress is dependent upon the demonstration of competence, this element does not mean that reasonable time limits cannot be imposed upon the learner. Some people may want to interpret this element to mean that only the trainee is responsible for his or her progress. Such is not the case; in a true CBAE program, accountability for learning is the responsibility of both the trainee and the resource person (instructor).

Desirable Characteristics

To further expand upon the concepts of CBAE programs, it is necessary to review the desirable characteristics of CBE programs and explain what they mean and do not mean to the operation of competency-based leadership development programs.

Instruction is individualized to the maximum extent possible. While the meaning of this concept seems clear, many have interpreted it falsely to mean that all instruction in CBAE has to be individualized or one-on-one. Not so--in fact, such an approach would probably be disastrous. Trainees need the opportunity to interact with their resource person(s) and fellow trainees.

What is meant is that attention will be given to the individual needs and interests of each trainee and that less instruction will be provided on a large-group, lecture-oriented basis. It is in working with individuals and small groups that attitudes and specific situational questions can most effectively be dealt with. The most effective instruction will involve an appropriate mix of individual and group instruction, as well as use of high-quality supportive materials to meet the individual needs of each trainee.

Learning experiences are guided by frequent feedback. In far too many administrator training programs, feedback to the trainee has been subjective and infrequently offered. Grades on a mid-term and final exam and one or two term papers are not enough. In CBAE, frequent (and usually positive) feedback is provided by the use of devices such as model answers, model critiques, and planning and performance checklists. Paper-and-pencil tests of knowledge may also be appropriately and effectively used as long as they are not the only type of assessment conducted.

Another well-accepted principle of learning is that learning should be successful in order for continued learning to take place. When a student experiences success, he or she will probably also experience satisfaction and be motivated to continue the learning process. Frequent opportunities for the student to test his/her understanding and application of knowledge and skills, as well as information about his/her success or need for further improvement, should be provided.

Emphasis is on helping the learner achieve program exit requirements. In some programs, considerable attention is focused on entry or admission requirements. For example, students may be required to score at or above a certain level on an entrance examination before they are admitted to a particular program. While it may be argued that this serves to admit only those qualified to succeed in the program, it may also be argued that this approach discriminates against those who are poor test-takers, regardless of their motivation or ability. Unreasonable entrance requirements may also serve to exclude some administrators who are already on the job.

In CBAE programs, little attention is given to learners' entry-level skills. Instead, the focus is on helping learners gain the competencies needed for successful performance. It is recognized that some trainees will have background experiences that others have not had and, therefore, will be able to quickly demonstrate competency in their areas of strength. This allows them to give greater attention to areas of weakness or to completing the program more quickly because they are ready to do so. In CBAE programs, the individual needs of the learner dictate the allocation of time and resources. All instruction is geared toward preparing persons to be competent administrators when they leave the program--regardless of their expertise at the time of entry.

Modules or other individualized learning packages are used as part of the instructional process. As pointed out earlier, permitting trainees to progress through the program at their own rate almost requires the packaging of learning materials into units (e.g., modules) of manageable size. A module is usually a self-contained unit of instruction that facilitates learning how to perform one or more competencies. A module commonly presents (1) essential information, facts, principles, procedures, and attitudes about some task, (2) practice, application, and feedback activities, and (3) a culminating performance activity and checklist.

Packaging learning resources in this manner greatly increases the flexibility of the instructional process. Professors and other resource persons are relieved of the time-consuming task of preparing and delivering extensive lectures--allowing them greater time for individual and small-group instruction and for the assessment of trainee progress. Students can work on the modules at times most convenient to them and can pace themselves as rapidly or as slowly as necessary to gain the knowledge and skills needed.

Modules also capitalize on the psychological concept that, for best results, content should be sequenced and presented in small amounts that build toward larger concepts and abilities. Trainees are nearly always more eager to begin a 50- to 80-page module than a 400-to 600-page textbook.

Both required and optional multimedia learning activities are used to provide for different learning styles and preferences. Most educators agree that instruction should be organized and implemented to accommodate the trainees' learning styles, sequence preferences, and learning activity preferences. No two people learn in exactly the same way, and any instructional program that does not provide some options for achieving the objectives forces all trainees into the same mold.

Depending on the design of the program and the instructional materials used, CBAE lends itself to a wide range of instructional options. First, the trainee may participate actively in deciding the order in which the competencies will be undertaken. Permitting students to have a "voice" in the selection of competencies--to make decisions based on their expressed interests and perceived needs--can help increase their motivation to learn.

Second, if well-developed modularized materials are used, the trainee will also have choices to make from the optional readings, media, and other activities usually available. The trainees will also have the option of working alone, with a colleague, with a small group, or in some combination thereof. Basically, the student is free to acquire the agreed-upon skills in almost any way he or she chooses. The only condition that needs to be imposed is that, at the end of the training period, the student must be able to perform the expected competencies at the required level.

Criterion-referenced, rather than norm-referenced, evaluation procedures are used. There has probably never been a truly rational reason for using norm-referenced grading. The use of norm-referenced evaluation of student achievement has long been thought to be an inhibitor of student growth and of curriculum change. "Failing" a fixed percentage of students serves only to remove students in fixed quantities--it does not stimulate maximal learning. One of the major advantages of CBAE programs is that assessment of trainee performance is based upon measurable criteria rather than on standard norms.

Criterion-referenced assessment uses performance standards that are based on realistic professional behaviors. Terminal performance objectives, therefore, are used to describe the setting for assessment (i.e., in an actual administrative situation), the specific performance expected, and the specific criteria to be used to judge the quality of performance. These criteria are observable and measurable indices of performance; they are usually presented in checklist form; and they can be used by the trainee's resource person to rate actual performance. Successful achievement, therefore, is based upon a trainee's meeting the prescribed professional criteria, rather than on his/her ability to compete against fellow trainees.

Instruction is, to a considerable degree, field-centered--based on actual work tasks and situations. While the theory and principles of administration are important, they are not really useful to the trainee until they can be applied to the performance of actual administrative tasks. CBAE instruction seeks to integrate theory and practice so that the trainee will be prepared to perform actual administrative tasks and processes.

Instruction is based on competencies derived from an analysis of the administrator's professional roles, rather than on content areas believed to be relevant. Through the use of well-developed training materials, students are (1) given essential background information; then (2) asked to practice applying that information through critiquing case studies, developing planning documents, or participating in simulations; and finally (3) required to perform the competency while serving in an actual administrative capacity.

While performance in the actual administrative role is sometimes difficult to arrange, especially with preservice trainees, the effort is worth it because it provides the only realistic evaluative situation. Opportunities for real-world assessment are greatly facilitated if the trainees participate for one year or longer in intern- or extern-type programs, where they work either full- or part-time as administrators, under the direct supervision of a qualified resource person.

Program planning and evaluation are systematic and continual. While this is true of any good instructional program, the concept is seriously implemented in most CBAE programs. Research and planning activities are considered to be an integral part of the program, rather than a desirable appendage. Every aspect of program design and implementation can and should be evaluated by comparing its congruence with the essential elements and desirable characteristics of CBAE.

Considerable effort initially goes into deciding which competencies are important to the trainees. Some states have done their own competency identification and verification studies, while others have adopted studies done by other researchers. A great deal of attention is usually given to developing a comprehensive professional development plan for each new trainee, so that the program can be individualized according to the specific needs and career objectives of the student.

The instructional materials used in CBAE programs are field tested and periodically evaluated to determine their effectiveness, and they are then revised or supplemented as needed. Most CBAE programs also periodically conduct a follow-up study of their participants to assess their satisfaction with the program and to ascertain ways in which it can be improved. This information is summarized and shared with program planners and implementers for use in revising program procedures and operations.

APPENDIX B

CBAE RESEARCH IN VOCATIONAL EDUCATION

By 1975, many persons had begun to identify the competencies needed by vocational administrators. Most of these studies were statewide in scope, although two studies were multistate or regional in focus. No national study had been conducted.

National Center Research

In response to the need for a national study, staff at The National Center for Research in Vocational Education, with USOE sponsorship, launched a research and development effort to--

1. conduct research to identify and nationally verify the competencies considered important to local administrators of vocational education; and
2. develop and field test a series of prototypic competency-based instructional modules and a user's guide.

Literature search and review. The first step involved conducting a comprehensive search of the literature to identify relevant administrator competency studies and available competency-based materials.

The literature search included a manual search and a computer search of several data bases, compiled over the period of July 1965 to February 1976. In the search for relevant studies in which competencies, tasks, or similar performance statements had been identified for local administrators of either secondary or postsecondary vocational education programs, 15 studies were found by Norton et al (1977a).

After reviewing the early studies, several conclusions were drawn. Perhaps most obvious was that the job of local administrators could be specified in terms of the competencies that such persons must perform. The research conducted had resulted in the compilation of numerous competency lists and in the verification of some of the competencies. A wide variety of methodologies had been used to identify and verify the most important competencies. Most researchers, however, had used a questionnaire and some type of Likert scale to obtain respondent ratings of the importance of the competencies. Only one of the studies resulted in any reported competency-based program (Ramp and Anderson, 1972) or instructional materials development efforts (Edwards, 1974).

A careful review of the early studies also raised certain questions. All but three of the studies located were doctoral dissertations. In many of the studies, all the competencies on the verification questionnaire were ranked as important by all the respondents. In addition, some studies relied upon literature reviews as the only basis for the development of competency statements. The problems inherent in this approach to establishing a comprehensive listing of task statements for any position are at least twofold. One problem is that any review of literature relies upon materials that have already been published and disseminated. Such materials are generally at least a year or two old and, hence, already somewhat dated before others have access to them. A review of the literature tends to provide a description of "what was," rather than "what is" or "what ought to be."

The second problem inherent in using a literature review as the only source of task statements is that it places total reliance upon secondhand information. Under these circumstances, the quality and comprehensiveness of the competencies identified are questionable. In many of the studies reviewed, practicing local administrators were not directly involved in writing the task statements. When persons who are not experts in the job being analyzed prepare the task list, one should question whether all the important tasks ever get on the list to be reacted to.

There was some consistency among the categories or functional areas of competency derived. However, there was little uniformity in the names given to the "competencies" identified. Some studies referred to duties and functions, others to critical behaviors, and still others to understanding and ability statements. The number of "competencies" identified ranged from 40 to 258.

Another highly questionable practice was used by several researchers in verifying the competency statements: they surveyed all the administrators within a particular state. This ensures the inclusion of responses from administrators who are performing at very low levels as well as those performing most satisfactorily. Baker (1977) warned about the use of competencies based upon average practice: "Without the qualities of good or advanced competence, the data may also be limited to current averages rather than advanced processes more capable of future evolution."

Given the limitations of the studies found, it was concluded that a rigorous national study, designed to identify and verify the competencies important to local administrators of vocational education, was needed. Further, it was concluded that innovative competency identification and verification techniques should be used to alleviate, or avoid altogether, the shortcomings of past studies. It was felt that the results of such research would provide (1) a defensible basis for designing CBAE training programs and (2) a solid framework upon which to develop modularized instructional materials.

At the same time the search for research studies was being made, a careful search was also made to identify existing competency-based instructional materials. This search proved almost futile; only one set of materials was located. These were the ABC--Instruction Packages, which had a learning guide type of format. They had been developed by Edwards et al. at Illinois State University. While these materials were definitely helpful, they were Illinois-specific to a considerable extent, were not self-contained, requiring tapes and other media that were not generally available, and had not been field tested outside of Illinois.

The literature review included carefully scrutinizing the 15 studies located to identify as many task statements as could be found. This immediately presented the researchers with some problems, because there seemed to be little uniformity among the various studies reviewed in terms of what constitutes a good competency or task statement.

To guide the selection and later writing of task statements, the following definitions of task and duty statements were established:

- A task is a discrete and meaningful work activity that has a definite beginning and ending time. A task statement is a written description of an observable performance; it describes what a person will do while performing in the administrator role.
- A duty is a larger, arbitrarily established, segment of work performed by an individual; it is composed of several related tasks. The duties and tasks performed by an individual constitute a job.

It was also agreed that a task statement must (1) be clearly stated so that it is easily understood by the intended respondent and potential users, (2) include terminology that is consistent with current usage of local administrators in the field, and (3) be explicit so that the same interpretation may be applied by all respondents. The components of an acceptable task statement, in order, are as follows:

- Verb--The verb must be a present-tense action word (e.g., plan, conduct, survey, develop, organize).
- Object--The object is the thing acted upon (e.g., program, machine, employee, school, committee).
- Qualifier--The use of a qualifying word or phrase is optional--to be used only when necessary to clarify the meaning of a task.

DACUM workshop. While a literature review is valuable as one source of competency statements, because it permits building upon the work of others, it has serious shortcomings as the only source of deriving task statements. To avoid the shortcomings of the literature-review-only approach, project staff decided to also use a relatively new and innovative approach to curriculum development and task identification as a second input to the task identification process. This procedure, known as DACUM (Developing A Curriculum), permits the identification of "what is" tasks and, to some extent, the identification of some of the "what ought to be" tasks.

The DACUM approach is based on the assumption that persons actively and very successfully engaged in an occupation should be the most knowledgeable about tasks related to that occupation. In this case, project staff concluded that a representative, but select, committee of vocational administrators would be the best source of information about what local administrators of vocational education do.

It is believed that the DACUM workshop that was conducted as part of this project was the first of its kind ever conducted in the United States to analyze the job of a professional educator (in this case, of local administrators). To facilitate the identification of additional task statements--particularly those that might reflect recent trends and changing administrator responsibilities--a carefully selected group of 12 experienced administrators from four different states was convened at the National Center as a DACUM workshop committee. The DACUM committee identified 36-40 additional tasks not found in the literature, and therefore, its input toward identifying a comprehensive list of possible tasks was considered extremely valuable.

Analysis, refinement, and merger of competency statements. This was a tedious, difficult, and time-consuming task, but one that was believed to be very important to developing a comprehensive listing of all the possible tasks that a local, secondary or postsecondary administrator of vocational education might perform. Project staff carefully examined each task/competency statement against three major criteria, as follows:

- Does it conform to the established task statement definition and criteria?
- What is its degree of similarity to other task statements (i.e., Does it have the same meaning? Does it have a similar meaning? Is it a new task [not similar]?)?
- Is the action verb used the most precise verb available?

A decision was made to merge all the task statements identified in both the literature review and in the DACUM workshop into a single comprehensive listing of statements. Since the DACUM listing was the newest and most comprehensive listing available, it was used as the baseline list against which project staff, working independently, could compare task statements from all the other relevant studies. Differences in opinion among project staff, and there were many at first, were then argued and debated in a committee meeting until consensus was achieved. During this process, the task statements were also submitted to three other National Center staff members who had previously been local and/or state-level administrators of vocational education. Their reviews were helpful in developing action verbs that were more descriptive of some of the tasks.

Administrator task inventory. An instrument was needed that would be attractive and would secure the type of information needed. A large number of task inventory instruments were reviewed to gain ideas on format, directions, and the most important questions to ask. It was felt that first grouping the refined task statements into broad categories would be helpful to respondents. Hence, each task statement was placed into one of nine broad categories of responsibility. Closely related tasks were also clustered together within categories.

It was decided that respondents (local administrators) should be asked to respond on a six-point Likert-type scale to two questions about each task statement: First, how important is the performance of this task in your job as a local administrator? Second, what degree of training do most administrators need in order to effectively perform this task?

Additionally, a ten-item information sheet was devised to gather demographic data about the respondents. Part of these data could be used to categorize respondents as being either secondary or postsecondary administrators and as being employed in a rural or urban area. Finally, directions and a cover letter to the potential respondents were carefully written and critiqued by several members of the project staff.

The instrument and cover letter were also independently reviewed by a three-member internal technical review committee and pilot tested with three local administrators in the Columbus area. The information obtained from these reviews was valuable in improving directions and instrument format.

National verification of competencies. In the national verification process, several important factors were considered in selecting the respondent group. First, it was decided that only the most competent administrators that could be identified should be asked to respond to the task inventory--for the reasons outlined earlier. A sample, biased in terms of including the most competent administrators available, was therefore sought.

Second, it was felt that broad geographic representation needed to be obtained if the research findings were to be generalizable across the United States. To provide that representation, one state was selected from each of the U.S. Office of Education's ten geographic regions, with the primary criteria being that the state have a sizable number of both secondary and postsecondary vocational programs. The states selected were Vermont, New York,

Pennsylvania, Alabama, Ohio, Texas, Nebraska, Utah, California, and Idaho. It was later discovered that Vermont did not have enough postsecondary administrators, so nominees for that level in Region I were then sought from Massachusetts.

Third, it was felt that the number of secondary and postsecondary local administrators selected should be proportionate to the total number of such persons employed. Further, it was felt that respondents at both levels should include both administrators who are responsible for vocational programs only and administrators of comprehensive programs who are responsible for both academic and vocational programs. To provide that representation, a sample, stratified according to those criteria, was sought.

Fourth, several other important and relevant selection criteria (respected by peers, minority representation, and both rural and urban representation) were suggested to the ten state directors of vocational education who were asked to nominate respondents. A total of 130 persons were nominated, and subsequently, a cover letter and the Administrator Task Inventory were sent to each of these nominees by mail.

Analysis and summarization of data. The data analysis and summarization were facilitated by key punching all the data for computer processing. By the cut-off date, 120 of the 130 administrators selected had returned usable instruments--a response rate of 92.3 percent. The data collected on both questions (importance and degree of training needed) were analyzed to determine the number of responses to each task statement and the median response to each task statement. A total of 166 of the 191 task statements were verified as important. An "important" competency or task statement was operationally defined as a competency receiving a median score of 3.0 or higher on the six-point Likert scale. A list of the 166 nationally verified competencies, clustered into nine categories, is presented as Appendix C of this guide.

Further analyses were conducted to determine if there were any statistically significant differences between (1) the way in which secondary and postsecondary administrators responded to the statements and (2) the way in which urban and rural administrators responded. A total of 31 tasks were found to differ significantly in the first instance; and 15 tasks, in the second instance. This research study formed the basis for most of the CBAE modules that have been developed, field tested, and published.

Subsequent Research

In the last few years, researchers in Arizona, Arkansas, Tennessee, Michigan, and other states have used the National Center competency list as a basis for verifying the competencies important to administrators within their respective states in order to confirm their relevance and to determine possible differences. In the state of Florida, Dominic Mohamed and others (1980-1982) began work on the identification of competencies considered unique and essential to local administrators in that state. The Florida study, unlike the National Center study, purposely omitted competencies, such as "maintain school discipline," that would be required of both general and vocational administrators. During 1977-1979, Calvin J. Cotrell and others identified and verified the competencies required of vocational administrators in Pennsylvania and developed criterion-referenced assessment instruments for use in evaluating the achievement of the specified competencies.

APPENDIX C

COMPETENCIES IMPORTANT TO SECONDARY AND POST-SECONDARY LOCAL ADMINISTRATORS OF VOCATIONAL EDUCATION

Master List of Categories and Task Statements

CATEGORY A: Program Planning, Development, and Evaluation

1. Survey student and parent interests.
2. Collect and analyze manpower needs assessment data.
3. Direct occupational task analysis for use in curriculum development.
4. Direct the identification of entry-level requirements for jobs.
5. Involve community representatives in program planning and development.
6. Obtain state and federal services and resources for program development.
7. Cooperate with district, county, regional, and state agencies in developing and operating vocational programs.
8. Prepare annual program plans.
9. Prepare and update long-range program goals.
10. Develop overall vocational program goals.
11. Coordinate district curriculum development efforts.
12. Approve courses of study.
13. Establish school admission and graduation requirements.
14. Recommend program policies to the administration and board.
15. Implement local board and administrative policies.
16. Interpret and apply state and/or federal vocational education legislation.
17. Interpret and apply other relevant state and federal legislation (such as CETA).
18. Develop plans for evaluating instructional programs.
19. Direct self-evaluation of the district vocational programs.
20. Involve external evaluation personnel in assessing program effectiveness.
21. Design and select instruments for evaluating the instructional program.
22. Evaluate the effectiveness of the instructional program.
23. Initiate student and employer follow-up studies.
24. Analyze student and employer follow-up studies.
25. Recommend curriculum revisions based on evaluation data.
26. Assess student testing and grading procedures.
27. Analyze the school's and community's feelings toward educational change.
28. Write proposals for the funding of new programs and the improvement of existing programs.
29. Coordinate local demonstration, pilot, and exemplary programs.
30. Design and oversee local research studies.
31. Interpret and use research results for program development and improvement.
32. Develop supplemental/remedial instructional programs to meet student needs.

CATEGORY B: Instructional Management

33. Establish instructional program entry and completion requirements.
34. Establish student rules and policies (such as attendance and discipline).
35. Enforce student rules and policies.
36. Design and oversee student progress reporting procedures.
37. Prepare a master schedule of course offerings.
38. Guide staff in selecting and using effective instructional strategies (such as individualized instruction).
39. Establish and implement a curriculum design that will achieve the school's instructional goals.
40. Guide staff in integrating and articulating the vocational program with the total educational program.

SOURCE: Taken from The Identification and National Verification of Competencies Important to Secondary and Post-Secondary Administrators of Vocational Education by Robert E. Norton, Kristy L. Ross, Gonzalo Garcia, and Barry Hobart. Columbus, OH: The Center for Vocational Education, The Ohio State University, 1977.

41. Promote the integration of vocational student organizational activities into the instructional program.
42. Provide for cooperative education and apprenticeship programs.
43. Provide for supplemental/remedial instructional programs.
44. Provide for special needs programs.
45. Provide for adult/continuing education programs.
46. Guide the articulation of secondary and postsecondary vocational program objectives.
47. Approve selection of instructional equipment.
48. Approve selection of instructional materials.
49. Maintain a learning resources center for students.

CATEGORY C: Student Services

50. Oversee student recruitment activities.
51. Oversee school admission services.
52. Arrange for work study programs.
53. Oversee student guidance and testing services.
54. Oversee student job placement and follow-up services.
55. Provide for a student record-keeping system.
56. Interpret and apply student rights, laws, and regulations.

CATEGORY D: Personnel Management

57. Prepare and recommend personnel policies.
58. Prepare and maintain a personnel handbook.
59. Assess program staffing requirements.
60. Prepare job descriptions.
61. Establish staff selection and recruitment procedures.
62. Recruit and interview potential staff.
63. Recommend potential staff to the administration and board.
64. Participate in negotiating staff working agreements.
65. Establish staff grievance procedures.
66. Resolve staff grievances and complaints.
67. Interpret the staff benefits program.
68. Counsel and advise staff on professional matters.
69. Schedule staff work loads.
70. Schedule staff leaves, vacations, and sabbaticals.
71. Oversee the work of teachers and other school personnel.
72. Provide for a staff record-keeping system.
73. Plan and conduct staff meetings.
74. Prepare bulletins and other communications designed to keep staff informed.
75. Observe and evaluate staff performance.
76. Recommend staff promotions and dismissals.
77. Provide guidance to the staff on legal matters affecting the school program.
78. Interpret and apply licensing and certification regulations.
79. Interpret and apply labor laws and regulations.
80. Interpret and apply affirmative action laws and regulations.

CATEGORY E: Staff Development

81. Assess staff development needs.
82. Assist in the preparation of individual staff profiles.
83. Counsel staff regarding personnel development needs and activities.
84. Establish and maintain a staff learning resources center.
85. Conduct workshops and other inservice programs for professional personnel.
86. Arrange for workshops and other inservice programs for professional personnel.
87. Provide for inservice programs for supportive personnel.
88. Provide for preservice programs for professional personnel.
89. Arrange for staff exchanges with business and industry.
90. Evaluate staff development programs.

CATEGORY F: Professional Relations and Self-Development

91. Maintain ethical standards expected of a professional educator.
92. Develop and maintain professional relationships with other administrators.

93. Develop and maintain professional relationships with state department of education personnel.
94. Develop and maintain relationships with personnel in professional organizations.
95. Participate in professional organizations.
96. Participate in professional meetings for self-improvement.
97. Promote professional image through personal appearance and conduct.
98. Assist with the development of state and/or federal plans for vocational education.
99. Participate in the development of vocational education legislation.
100. Prepare policy and commendation statements.
101. Represent teacher interests and concerns to other administrators and the board.
102. Develop effective interpersonal skills.
103. Read and use information from professional journals, reports, and related materials for self-improvement.
104. Apply management techniques to personal work assignments.
105. Develop cooperative problem-solving and decision-making skills.
106. Assess personal performance as an administrator.

CATEGORY G: School-Community Relations

107. Develop a plan for promoting good public relations.
108. Prepare and recommend public relations and communications policies.
109. Coordinate use of occupational (craft) advisory committees.
110. Organize and work with a general vocational advisory council.
111. Develop working relationships with employers and agencies.
112. Prepare and recommend cooperative agreements with other agencies.
113. Involve community leaders (political and nonpolitical) in school programs and activities.
114. Participate in school organizations.
115. Participate in community organizations.
116. Promote good relationships between vocational and general education staff.
117. Encourage staff participation in community civic, service, and social organizations.
118. Promote cooperative efforts of parent and teacher groups.
119. Conduct conferences with individuals relative to the vocational programs.
120. Meet and confer with visitors.
121. Conduct informational programs for the public (such as open house and career awareness programs).
122. Make public presentations on school programs and activities.
123. Conduct public hearings and meetings on school issues.
124. Conduct orientation programs for students and staff.
125. Conduct recognition programs for students, staff, and community supporters.
126. Plan for exhibits and displays.
127. Develop materials to promote the vocational programs.
128. Write news releases for school and area media.
129. Obtain and analyze informal feedback about the school.
130. Evaluate the public relations program.
131. Interpret and apply public "right-to-know" laws and regulations.

CATEGORY H: Facilities and Equipment Management

132. Assess the need for physical facilities.
133. Conduct land and facility feasibility studies.
134. Recommend building sites.
135. Recommend the selection of an architect.
136. Oversee architectural planning.
137. Submit building and equipment specifications.
138. Analyze building and equipment contract bids.
139. Recommend acceptance of new building.
140. Procure major equipment and furnishings.
141. Plan space requirements for programs.
142. Assign space according to priority needs.
143. Develop and implement an equipment and supply inventory system.
144. Establish preventive maintenance program for equipment and facilities.
145. Interpret and apply health and safety laws and regulations.
146. Develop and implement safety programs.
147. Establish emergency plans (such as fire and disaster).
148. Establish and oversee a security program.

149. Schedule and oversee community's use of facilities.
150. Develop long-range building and equipment plans.
151. Prepare and submit renovation and alteration plans.

CATEGORY I: Business and Financial Management

152. Prepare and recommend business policies.
153. Establish purchasing and payment procedures.
154. Establish receiving and shipping procedures.
155. Prepare and regulate operational budgets.
156. Prepare and regulate program budgets.
157. Prepare and regulate capital improvement budgets.
158. Prepare long-range budgets based on total program requirements.
159. Adopt an appropriate financial accounting system.
160. Analyze the cost of operating various instructional programs.
161. Locate sources of funds for program development and operation.
162. Approve all major expenditures.
163. Approve requisitions and work orders.
164. Determine insurance coverage needs.
165. Respond to business correspondence.
166. Prepare local, state, and federal reports.

APPENDIX D

DEVELOPMENT OF THE CBAE MODULES

The procedure that was used by the Consortium and the National Center in developing and field testing the administrator modules can best be described as a cooperative process. In one of the first steps, the member states voted to establish the priority competencies for module development. Once priorities were established, the state representatives were asked to nominate qualified persons who could assist National Center staff, on a consultative basis, as either module writers or reviewers. The nominees were contacted and asked to apply, if interested, to serve in a consultant role on one or more of the modules to be developed. From these applications, Consortium staff selected the most qualified persons available.

A four-stage development process was used to prepare the modules, as follows:

STAGES	MAJOR STEPS
PREPARE PROSPECTUS	1. Analyze clustered competencies 2. Search for and review literature 3. Identify consultant-writers 4. Draft prospectus 5. Submit to states for critique
PREPARE FIELD-REVIEW VERSION	6. Summarize prospectus reviews 7. Draft written materials 8. Review and revise drafts 9. Format and edit materials 10. Submit to states for review
PREPARE FIELD-TEST VERSION	11. Summarize field-review data 12. Revise module as needed 13. Conduct internal review 14. Format and edit module 15. Submit to states for field testing
PREPARE PUBLISHED EDITION	16. Summarize field-test data 17. Revise module as needed 18. Conduct internal review 19. Format and edit module 20. Prepare camera-ready copy

A brief description of the procedures used at each stage of development follows.

Preparation of the module prospectus. A module prospectus is a four- to eight-page proposed outline for the module. It contains (1) statements of the terminal and enabling objectives, (2) an outline of the topics to be covered in the information sheets, (3) descriptions of the proposed learning activities and feedback devices, (4) a tentative list of the performance assessment criteria, and (5) a list of the specific competency statements to be addressed by the module.

A module prospectus for each module was drafted by the Consortium staff member assigned to develop the module--after first analyzing the competencies to be covered and reviewing the available literature. The prospectus was further developed and refined, however, at a one-day conceptualization meeting involving the consultant-writers and Consortium staff. Three copies of the refined prospectus were submitted to each state representative for review and critique by the persons designated by the representative. A twenty-day turnaround time was requested so that the module writers could benefit from the critiques received as they prepared the field-review version.

Preparation of the field-review version. After the conceptualization meeting, the two consultant-writers were asked to begin immediately to prepare materials for the module (e.g., information sheets, case studies, model answers) based on their knowledge, experience, and expertise in the particular area. At the same time, a National Center staff writer continued to search for and review relevant literature and sample materials. The staff writer maintained contact with the consultant-writers to answer questions, check on progress, and relay information received from the prospectus critiques.

Once materials were received from the two consultant-writers, the staff writer prepared the field-review version of the module by merging, rewriting, supplementing, editing, and formatting the material into a full-blown draft of the module. It was then reviewed internally by another Consortium staff member before duplication for field-test purposes. Each member state and/or cooperating institution of higher education received thirty copies of each module for field testing. In addition, field-test guidelines and instruments were provided for use by both the resource persons and administrator trainees. An orientation and training session was conducted initially to prepare resource persons for their role in field testing.

Preparation of the published edition. Field-test data from all states were summarized and analyzed as a basis for preparing the published version of each module. The goal was to collect data from at least 5 different states and a minimum of 50 administrator trainees before revision was begun. However, an average of approximately 30 trainees completed field testing of each module, with 20 tests being the minimum number completed on any single module.

Major Components of the CBAE Modules

The module format is standardized into four major components: title page, introduction, module structure and use section, and learning experiences. Let us look at each of these components in more detail.

Title Page

The title page identifies the competency area to be acquired by the learner upon completion of the module (e.g., Identify Financial Resources for Vocational Education). Through the use of an action verb, the title is written in performance terms. Following the title, the module number and category are listed. This information will help the learner locate the module in the sequence of CBAE modules and determine its relationship to the other modules.

Introduction

The introduction explains the competency area that is addressed by the module and why that competency is important to vocational education administrators. It is designed to motivate the trainee to want to acquire the skill. It explains how the competency addressed relates to the administrative function. When necessary, terms that are unique to the module are also defined.

Module Structure and Use

The Module Structure and Use Section is designed to answer questions about characteristics that are unique to a particular module. Information about four basic areas appear in this section of each module: objectives, prerequisites, resources, and selected terms.

Objectives. This section lists the objectives of each learning experience: the terminal objective that the learner will be expected to demonstrate when the module is completed, and any enabling objectives included in the module to help the learner achieve the terminal objective.

Prerequisites. If there are skills the administrator needs to possess before taking a particular module, these are listed in a prerequisites section. Although these competencies are listed in terms of module titles, the trainee should be advised, as per the instructions, that the prerequisite competencies need not necessarily be obtained by completing those modules. They may be acquired through other means agreed upon by both the resource person and trainee. There are also instances in which it is suggested that two or more modules be completed concurrently because of their close relationship.

Resources. This section lists, by learning experience, the required and optional outside resources, if any, needed to complete the module. This enables the learner to secure the necessary resources before starting the module. It should also alert the resource person to make the necessary arrangements for securing the needed resources prior to the time at which the trainees will need them.

Selected Terms. This section lists, and defines, terms unique to these modules.

Learning Experiences

A series of learning experiences make up the major portion of each module. Each learning experience contains several required and usually one or more optional activities. Completion of the activities contained within a learning experience leads the learner toward the accomplishment of the objective of that learning experience. By successfully completing all the learning experiences contained in a module, the learner should attain the competency identified in the module title. This building process provides the learner with the foundation needed to achieve the desired competency. The process, incorporated into a series of learning experiences, allows the learner to acquire information about a competency, practice or apply that information, and finally, perform the competency while working in an actual administrative situation. Sample 1 illustrates the typical instructional sequence employed in the modules.

Overviews. Each learning experience, except the final one, begins with an overview (see sample 2). The overview identifies the objective of the learning experience and presents a brief summary of what activities are included in the learning experience. It is designed to help the trainee decide whether he/she needs to complete the entire learning experience or only portions of it. Symbols are used to signify the type of activity indicated.

Activity directions. Following the overview page, the trainee is guided through the learning experience activity-by-activity, with symbols paralleling those on the overview page. Each activity also contains detailed directions regarding how the activity is to be completed. Some learning activities provide the trainee with the essential knowledge or background information required to understand the nature of the competency. These activities may include the following:

- Reading an information sheet
- Reading one or more external references
- Interviewing an experienced administrator
- Observing an experienced administrator
- Viewing a film, videotape, or filmstrip
- Obtaining and reviewing sample plans, instruments, etc.
- Attending special meetings or conferences

Other learning activities give the trainee an opportunity to practice or apply the competency in a simulated situation. These activities may include the following:

- Completion of self-checks
- Role-playing with peers
- Critiquing case studies
- Developing written plans or other materials
- Critiquing other materials
- Critiquing the performance of administrators

Most of the items needed by the trainee--information sheets (see sample 3), self-checks, model answers, case studies, planning and critiquing forms, sample instruments, and performance assessment forms--are included within the modules. Optional learning activity resources--such as external references, films, and videotapes--must be obtained with the help of the resource person. The resource person's assistance is also required in scheduling seminars, individual conferences, and observations or interviews of experienced administrators. Most of the learning experiences include one or more optional learning activities (see sample 4), which are designed

to supplement, enrich, and reinforce the administrator's learning. Whenever possible, completion of these activities should be seriously considered.

Feedback devices. At the end of each learning experience, the trainee is provided with feedback on how well he or she is doing. It may be in the form of a self-check with model answers; a case study with a model critique; or a planning work sheet with a checklist for the trainee, peers, or resource person to use in rating the trainee's progress. The feedback devices are always on separate pages to facilitate their use. See sample 5 for an example of a typical self-check.

Final experience. The last learning experience in each module requires the trainee to perform the desired competency in an actual administrative situation (see sample 6). A terminal objective describes the specific competency the learner is expected to demonstrate. The administrator's performance is assessed by a resource person, using the Administrator Performance Assessment Form provided in the back of the module (see partial form, sample 7). This assessment form lists the criteria against which the administrator's performance is to be judged, and it contains a rating scale for indicating how well the administrator performed on each criterion.

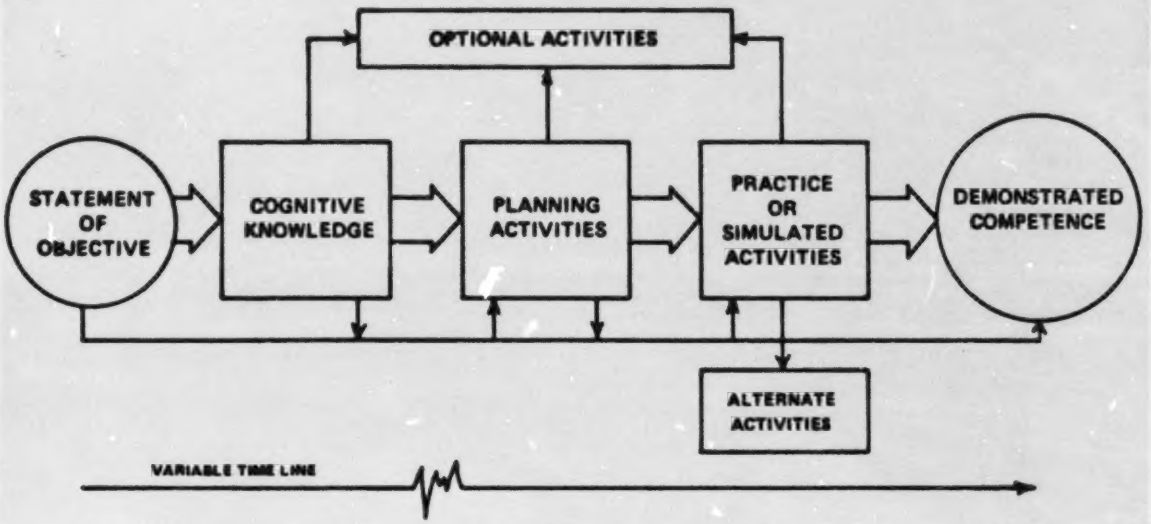
Supporting Materials

In addition to the 29 modules, the Consortium for the Development of Professional Materials for Vocational Education has produced the following supporting materials:

- Guide to Vocational-Technical Education Program Alternatives: Secondary and Postsecondary--An Introduction--This guide is intended as a supplement to the module series. It provides a brief overview of the typical vocational programs available and the general kinds of requirements involved that would have implications for program planning and budgeting. The guide would be useful to vocational administrators who are developing local plans for vocational education. It would be particularly useful to those administrators who come from general-education backgrounds but who now have responsibility for vocational programs.
- Guide to Using Competency-Based Vocational Education Administrator Materials--This brief guide has been developed to introduce both the preservice and inservice user to competency-based administrator education (CBAE). The information in this guide is organized according to questions that administrators are most likely to ask about CBAE in general and about the National Center's CBAE materials in particular.
- Resource Person's Guide to Implementing Competency-Based Administrator Education Concepts and Materials--This guide is designed to help prospective resource persons--university professors; state department of education supervisors; or administrators at the state, regional, and local level--to install the CBAE approach in a college, university, or other educational agency. In addition, it provides information to prepare prospective resource persons to guide and assist preservice and inservice administrators in the development of professional skills through the use of the CBAE modules.
- An Introduction to Competency-Based Administrator Education--This 11-minute, 60 color slide/audiotape presentation is designed to give a general overview of the National Center's CBAE curricula and programs. Included are explanations of (1) the need for CBAE, (2) characteristics of CBAE, (3) the research base on which the National Center and Consortium-developed CBAE curricular materials are built, (4) developmental and testing procedures used in producing the materials, and (5) the characteristics and format of the materials.
- Linker's Tool Kit--This collection of materials (to be available in late 1983) combines existing CBAE materials with new information to provide guidance to the vocational educator who wants to establish and maintain linkages with business, industry, labor, and government, and the military. This kit will contain pertinent modules, as well as taped interviews, fact sheets, sample brochures, and linkage models. The kit, like the previous modules, can be used as a teaching/learning tool, as well as a helpful resource to the vocational administrator.
- Vocational Administrator Competency Profile--Each profile sheet shows the nine module categories and the specific titles of each of the 29 CBAE modules. Users find these profiles useful in a number of ways, such as highlighting priority competencies and recording administrator progress and competency levels. The profiles are packaged in pads of 50 profiles each.

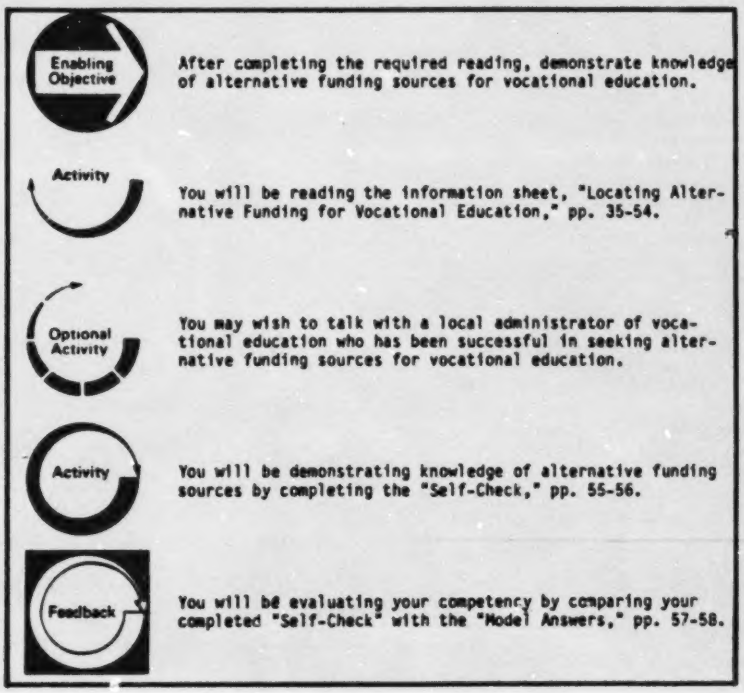
SAMPLE 1

TYPICAL MODULE INSTRUCTIONAL SEQUENCE



SAMPLE 2

OVERVIEW PAGE


Enabling Objective
After completing the required reading, demonstrate knowledge of alternative funding sources for vocational education.
Activity
You will be reading the information sheet, "Locating Alternative Funding for Vocational Education," pp. 35-54.
Optional Activity
You may wish to talk with a local administrator of vocational education who has been successful in seeking alternative funding sources for vocational education.
Activity
You will be demonstrating knowledge of alternative funding sources by completing the "Self-Check," pp. 55-56.
Feedback
You will be evaluating your competency by comparing your completed "Self-Check" with the "Model Answers," pp. 57-58.

SAMPLE 3

INFORMATION SHEET EXCERPT

For information about the broad picture of evaluating staff performance--what it is, why it is important, who evaluates what and how--read the following information sheet.

CONSTRUCTIVE STAFF EVALUATION: THE NEED AND THE REALITY

All employers are concerned about how their employees perform. They want and require high-quality performance for the salaries they pay. The insurance company can measure this quality by monitoring the accuracy of the paperwork a salesperson completes, by the number of new policies, by the number of continuing policies. The tool and die company can measure the performance of its machinists by using criteria such as number of "widgets" produced, in a certain amount of time, to certain standards. Yet the community--represented by an educational governing board--has a much more difficult and sometimes controversial task to perform in trying to evaluate its school employees: administrators, supervisory staff, teaching staff, professional and nonprofessional support staff. What makes a good administrator, a good teacher, a good counselor?

Education involves individual people (administrators, instructors, students) with individual differences. The administrator who successfully motivates one teacher can have a personality conflict with another teacher. The teacher whose teaching style is perfect for one student's learning style can alienate another student with that same style. The student who sits passively in a class for a year, seemingly unimpressed and uninvolved, can tell the teacher ten years later that that class made a critical difference in his/her life. There is no scientific, hard-and-fast, mutually agreed upon set of measurement criteria. There are few instant, observable, quantifiable results forthcoming.

SAMPLE 4

OPTIONAL ACTIVITY

In order to become more aware of the way people feel about staff evaluation, you may want to do some investigative reporting. Arrange through your resource person to visit, within a single institution or district, persons in a variety of roles:

- Administrator with responsibility for staff evaluation
- First-year teacher
- Experienced teacher
- Supervisor/department head
- Union/professional organization representative
- Noninstructional/support staff members

Maintaining a very neutral, nonjudgmental attitude on your part, ask each of these people questions about staff evaluation in their institution/district, e.g.:

- How is the staff evaluation conducted? How often?
- How effective is the process?
- Do staff development activities, either group or individual, grow out of these evaluations?

Compare the responses you receive. What have you discovered? What implications does this have for your responsibilities as a staff evaluator? You may wish to prepare a written or oral report on your findings to share with your peers or resource person.

SAMPLE 5

FEEDBACK DEVICE

The following items check your comprehension of the material in the information sheet, "Public Funding Mechanisms for Vocational Education Programs," pp. 9-26. Each of the four items requires a short essay-type response. Please respond fully, but briefly, and make sure you respond to all parts of each item.

SELF-CHECK

1. Local property taxes provide the largest source of local education revenues. How would you describe the local taxation process? Include an explanation of (1) the difference between bonds and levies, (2) the effect of local assessment rates on the value of taxable property, and (3) mills.

2. How is the amount of money that can be raised locally by taxes limited and by whom? How are tax limits, or lack thereof, related to the so-called taxpayers' revolt?

SAMPLE 6

FINAL EXPERIENCE

Learning Experience III

FINAL EXPERIENCE

While working in an actual administrative situation, evaluate staff performance.

As part of your administrative responsibility, evaluate staff performance. This will include--

- developing an evaluation system
- implementing the evaluation effort
- using evaluation data for staff improvement and employment decision-making purposes

NOTE: As you complete each of the above activities, document your activities (in writing, on tape, through a log) for assessment purposes.

Arrange in advance to have your resource person review your documentation and observe at least one instance in which you are involved with others in the evaluation process (e.g., conducting a planning meeting, a pre- or postobservation conference, or a classroom observation).

Your total competency will be assessed by your resource person, using the "Administrator Performance Assessment Form," pp. 103-106.

Based upon the criteria specified in this assessment instrument, your resource person will determine whether you are competent in evaluating staff performance.

*If you are not currently working in an actual administrative situation, this learning experience may be deferred, with the approval of your resource person, until you have access to an actual administrative situation.

SAMPLE 7

ADMINISTRATOR PERFORMANCE ASSESSMENT FORM

Name _____

Date _____

ADMINISTRATOR PERFORMANCE ASSESSMENT FORM

Evaluate Staff Performance

Directions: Indicate the level of the administrator's accomplishment by placing an X in the appropriate column under the LEVEL OF PERFORMANCE heading. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A column.

	LEVEL OF PERFORMANCE					
	N/A	None	Poor	Fair	Good	Excellent
In preparing for the evaluation effort, the administrator:						
1. developed--with staff input--a written plan for the overall evaluation effort that:						
a. clearly summarizes the philosophy of evaluation (e.g., its expressed purpose, how frequently it should occur, confidentiality).....	☐	☐	☐	☐	☐	☐
b. is consistent with the philosophy of the organization...	☐	☐	☐	☐	☐	☐
c. is compatible with the provisions and terms of staff contracts, union precepts, legal requirements, etc.....	☐	☐	☐	☐	☐	☐
d. defines his/her role and responsibilities.....	☐	☐	☐	☐	☐	☐

NOTES

APPENDIX E

CBAE PROGRAM DESCRIPTIONS

Illinois - Southern Illinois University at Carbondale

Program Title - Competency-Based Vocational Administrator Education

Level - Graduate inservice internship

Start-up Date - 1973

Program Description

The Competency-Based Vocational Administrator Education Program was developed as an outgrowth of a leadership development project cooperatively undertaken by Illinois State University and Southern Illinois University at Carbondale. Through this original effort, 159 performances or competencies were identified, which are used as the basis of the Competency-Based Vocational Administrator Program now operating at Southern Illinois University at Carbondale.

The program is largely field-based, involving students who are vocational education teachers and administrators. Beyond the rather standard graduate school activities of registering for course hour credits, pursuing readings, and taking examinations, three aspects of the program should be noted: (1) a tripartite educational network, (2) a portfolio of proficiency development, and (3) a comprehensive, full-year internship in a cooperating educational institution.

Tripartite educational network. A memorandum of agreement is signed by a cooperating educational institution, an occupational education intern, and a cooperating university. The university provides classroom instruction and internship coordination, while the cooperating educational institution provides an intern with an average of two hours a day for pursuing activities that relate to proficiency/competency development.

Portfolio of proficiency development. Each intern develops a portfolio that outlines at least the 159 performances to be developed. For each of the performance statements, a pre- and postassessment are included. For each performance statement, the interns must assess their level of cognitive proficiency development. Affective domain assessments are made in a similar manner. The portfolio places the responsibility for competency development squarely upon the interns' shoulders.

Internship. Theory and practice come together for the student through participation in a daily internship. University coordinators visit the interns on a regular schedule, and discussions about programs and problems are held.

Coordinators of the program believe that both classroom and internship experiences are necessary components to successfully implement a competency-based program. Given the opportunity to develop proficiency through both classroom instruction and an internship, students seem to reach competency efficiently and effectively.

Program Contacts

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Southern Illinois University
at Carbondale
Carbondale, IL 62901

Dr. Bill Gooch
Vocational Education Studies Department
Southern Illinois University
at Carbondale
Carbondale, IL 62901

Pennsylvania - Temple University

Program Title - Leadership Intern Field Experience (LIFE)

Level - Master's, specialist, or doctoral degree

Start-up Date - July 1975

Program Description

LIFE is competency-based. Demonstrated application-level competency development is essential in order to receive vocational certification in Pennsylvania. Therefore, the leadership offerings at Temple University emphasize competency development, rather than the accumulation of semester hours of credit. Although the program operates in a time-based university structure, exit from the curriculum is determined by competency attainment and not semester hours of credit.

LIFE is a program without walls. The school sites for the internships are located in the 17 counties in the eastern region of the state. Twelve interns are assigned to each of two field resource persons, who travel distances of up to 150 miles to provide assistance at 20 different area vocational schools.

Approximately 100 more students are in the pre-internship phase of the program. The outlines of program requirements indicate the courses that may be used to help a student acquire the theory for the competencies to be developed. A majority of the pre-internship, or theory, courses are required for admission to the internship phase.

LIFE uses differentiated staffing. The program engages a coordinator, senior faculty, field resource persons (FRPs), and resident leadership resource persons (RLRPs). The coordinator is responsible for (1) handling admissions, (2) reviewing students' completion of the program, (3) assisting senior faculty who teach the pre-internship courses, (4) supervising and providing inservice education for FRPs, and (5) directing leadership theory seminar activities for the interns. The FRPs are full-time Temple University faculty who travel to the schools to assist the RLRPs and interns. The RLRPs are certificated local directors or supervisors who provide interns with the day-to-day assistance they need on-site. The RLRP, usually the director of the school where the intern is employed, is a full-time local school employee and a part-time, nonpaid university faculty member.

Self-pacing is a part of LIFE. The completion of a minimum of five modules per semester is required as part of a student's involvement in the leadership theory and seminar combination. However, an intern may complete many more modules within a semester. Several interns have completed seven or eight modules, and a few have completed as many as twelve.

This self-pacing concept is applied to application-level competency development as well. Interns may develop as many competencies during the semester as their energy and situation will permit. An intern may contract to develop ten competencies or forty.

LIFE is individualized. In the process of developing a competency, an individual will have theory needs that may be met by individualized assistance and the selection of the appropriate module and learning experience.

Once the needs assessment process is completed for a particular intern, the next step is to develop plans for how the intern will attain the identified competencies. In the prescription process, the particular activities, completion schedule, and persons to be involved are identified. The input of the RLRP is sought to make the competency-development experience most beneficial for the intern. The FRP coordinates this effort and also provides input concerning the most appropriate module to use to acquire the theory supporting each competency.

Program Contact

Dr. Calvin J. Cotrell
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RA 255
Temple University
Philadelphia, PA 19122

Ohio - Kent State University

Program Title - The Ohio Vocational Education Leadership Personnel Development Program

Level - Graduate preservice and inservice

Start-up Date - 1966

Program Description

The goal of this leadership program is to prepare the additional personnel needed to provide the administrative and supervisory leadership necessary for achieving the goal of providing vocational opportunities for all. The program is organized into three phases.

Phase I: Preservice. A comprehensive program, concerned with all facets of vocational leadership, is presented in an intensive workshop (starting in July), which is offered through the combined efforts of the instructional staff at Kent State University, local administrators, and state staff. The organizational structure consists of both large- and small-group presentations. Topics of a general nature that are relevant to all vocational areas are presented in the large-group sessions in an effort to use time and staff economically. Topics that are unique to specific vocational service areas are presented in small-group sessions.

The preservice phase is planned, coordinated, and conducted by the project director and state staff from each of the vocational service areas. The preservice phase is six weeks in length for those preparing for supervision and eight weeks for those preparing to become directors. The major objective of the preservice phase is to help each participant to develop the basic competencies and knowledge needed in order to function as an intern in a local school setting.

Phase II: Internship. The primary purpose of the internship is to provide practical experience in the supervision of vocational education, under the guidance of competent and experienced people at the operational level. The specific objectives of the program are (1) to provide opportunity for practical application of the program content, (2) to relate theory and practice, (3) to provide guidance for further in-depth study of supervisory techniques and functions, and (4) to promote the exchange of ideas and concepts through professional seminars.

Intern placement is under the authority of the program director, working in cooperation with the assistant directors of vocational education in the state department. Reasonable efforts are made to provide placement near the intern's present residence.

The internship consists of a ten-month period. Salary provisions for the intern are based on the regualar salary schedule of the participating school, based on a ten-month contract. The local school is reimbursed from the State Department of Education, Division of Vocational Education.

The on-site supervision of interns is a cooperative effort, involving the program director, state supervisory staff, and local administrative/supervisory personnel. The supervision and support of the intern are important factors in achieving the objectives of the program.

Phase III: Inservice. Three inservice seminars, each two days in length, are scheduled in November, February, and May. The seminar activities provide an opportunity for interns to share and compare experiences and concerns, and to consult with state authorities and consultants in each service area. The seminars are spaced throughout the year's internship in order to capitalize on the trainees' experiences. The costs of the seminars are covered by the program, and trainees are reimbursed for the approved cost of participation.

Program Contact

Dr. Carl V. Gorman, Associate Professor
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Kent State University
Kent, OH 44242

Florida - Florida International University

Program Title - The Florida Preservice and Inservice Vocational Administration Extern Training Program

Level - Graduate preservice and inservice

Start-up Date - 1978

Program Description

Instruction is competency-based. The program uses the vocational administrator competencies and general school administrator competencies that have been developed under the sponsorship of the State Council on Teacher Education. Consortium-developed (The National Center for Research in Vocational Education) and locally developed modules are used to deliver instruction covering these competencies.

Instruction is individualized. All participants entering this program are required to fill out an Applicant Data Form. Information gathered using this form is evaluated by the State Teacher Certification Office in terms of individual certification status. Participants also complete the Vocational Administrator Competencies Checklist and the General School Administrator Competencies Checklist. Data from these checklists are reviewed by program staff to determine each participant's level of proficiency in these competencies.

Based on the participant needs identified, an individual program is prescribed. Each participant, under the guidance of a vocational teacher educator and other resource persons, decides on the total number of instructional modules needed, as well as the sequence in which and pace at which he/she can best accomplish the required competencies.

The modules used in the program provide the student with theoretical knowledge concerning each competency, as well as with opportunities to practice the competency. Students are provided with immediate feedback after each learning experience in the form of (1) self-checks and model answers or (2) checklists used by the student, a resource person, or peers in rating the student's performance. When students feel that they have adequate background and practice in the competency, arrangements are made for them to complete the module's final experience: performance and evaluation of the competency in an actual administrative situation. A student may be recycled through additional learning experiences if it is determined, through a consensus of the program staff, that his/her level of competency does not meet the standard.

The program uses formal group instruction, seminars, supervised field/clinical experiences, on-the-job training, and internships. In addition, films, videotapes, and other mediated materials are used. Resource persons, too, are used, including university staff, staff in the division of vocational education, local education personnel, and representatives of business, industry, and agriculture.

The learning experiences are completed primarily in off-campus, field-based settings, using the CBAE modules. Field visitations to each participant are made throughout the year by resource persons. A record of each visitation is maintained, using a Record of Field-School Visits Form. Final assessment of student performance is always conducted in the actual administrative situation.

Exit requirements are specified. Mastery of the competencies identified in an individual participant's plan must be accomplished within one year. Final evaluation of each participant's competency is made by the faculty of the cooperating university and regional staff of the state department. Upon satisfactory completion of the program, the project director recommends to the state department of education that the participant be certified.

Program Contact

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Colleges Development
Florida International University
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Miami, FL 33199

Arkansas - University of Central Arkansas

Program Title - Competency-Based Administrative Staff Development

Start-up Date - October 1981

Program Description

The major purposes of the Arkansas Extern Program are (1) to develop and recommend certification standards for the Arkansas vocational administrator certificate and (2) to develop and implement a 120-hour competency-based certification program for current directors of postsecondary vocational schools.

After an introductory session on CBAE, participants are assigned modules, and dates for half-day monthly seminars are set. During these half-day seminars, resource persons from the state department of education, vocational division, and educators from the University of Central Arkansas, the University of Arkansas, and Arkansas State University work with participants to cover materials in the CBAE modules. Their learning is then applied back at their work site.

Currently underway is the process of matching CBAE competencies and modules with existing courses to better integrate CBAE into existing institutional structures.

For the second phase (1982-83) of the CBAE program, a resource person has been funded at each institution to serve the competency-based administrator program and the performance-based teacher education program. During 1982-83, secondary vocational directors will be involved in a similar CBAE/certification project in Arkansas.

This young CBAE extern program has produced several positive outcomes:

- Arkansas now has three certificates for postsecondary vocational directors and will soon have certificate standards for secondary directors.
- Vocational administrators are becoming familiar with competency-based instructional procedures.
- Through monthly seminar meetings and the use of the CBAE modules, Arkansas administrators should become more competent in their jobs.
- Upon the completion of a series of modules, the vocational directors will become qualified to serve as resident resource persons for students participating in preservice vocational director certification and become qualified for obtaining the administrator certificate(s).
- Three universities in Arkansas are developing credit-awarding competency-based vocational director certification program(s).

Program Contact

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NOTES

Prerequisite Competencies for the Competency-Based Administrator Education Modules

Modules shown before the solid arrow (⟶) are prerequisite to modules to which the arrow points. The modules shown before the broken arrow (⇢) indicate that the modules in question are closely related and could be completed concurrently. Module numbers within parentheses indicate prerequisites from other module categories.

Program Planning, Development, and Evaluation

A-1 ⟶ A-2
A-3

Instructional Management

(A-1) ⟶ B-1 ⟶ B-2
(A-2) ⟶ B-3

Student Services

(F-2) ⇢ C-1
C-2
C-3
C-4

Personnel Management

D-1 ⇢
D-2 ⇢
(B-2) ⇢ D-3
(E-1) ⇢
D-4 ⇢

Professional and Staff Development

E-1 ⇢
(B-2) ⟶ E-2
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School-Community Relations

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Facilities and Equipment Management

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Business and Financial Management

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Program Improvement

I-1
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Competency-Based Administrator Education Materials

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Guide to Using Competency-Based Vocational Education Administrator Materials
Resource Person's Guide to Implementing Competency-Based Administrator Education Concepts and Materials
An Introduction to Competency-Based Administrator Education (slide/audiotape)

For information regarding availability and prices of these materials contact—AAVIM, American Association for Vocational Instructional Materials, 120 Driftmier Engineering Center, University of Georgia, Athens, Georgia 30602, (404) 542-2586.

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